

Digital Opportunities in UNS

Taiwan and emerging markets

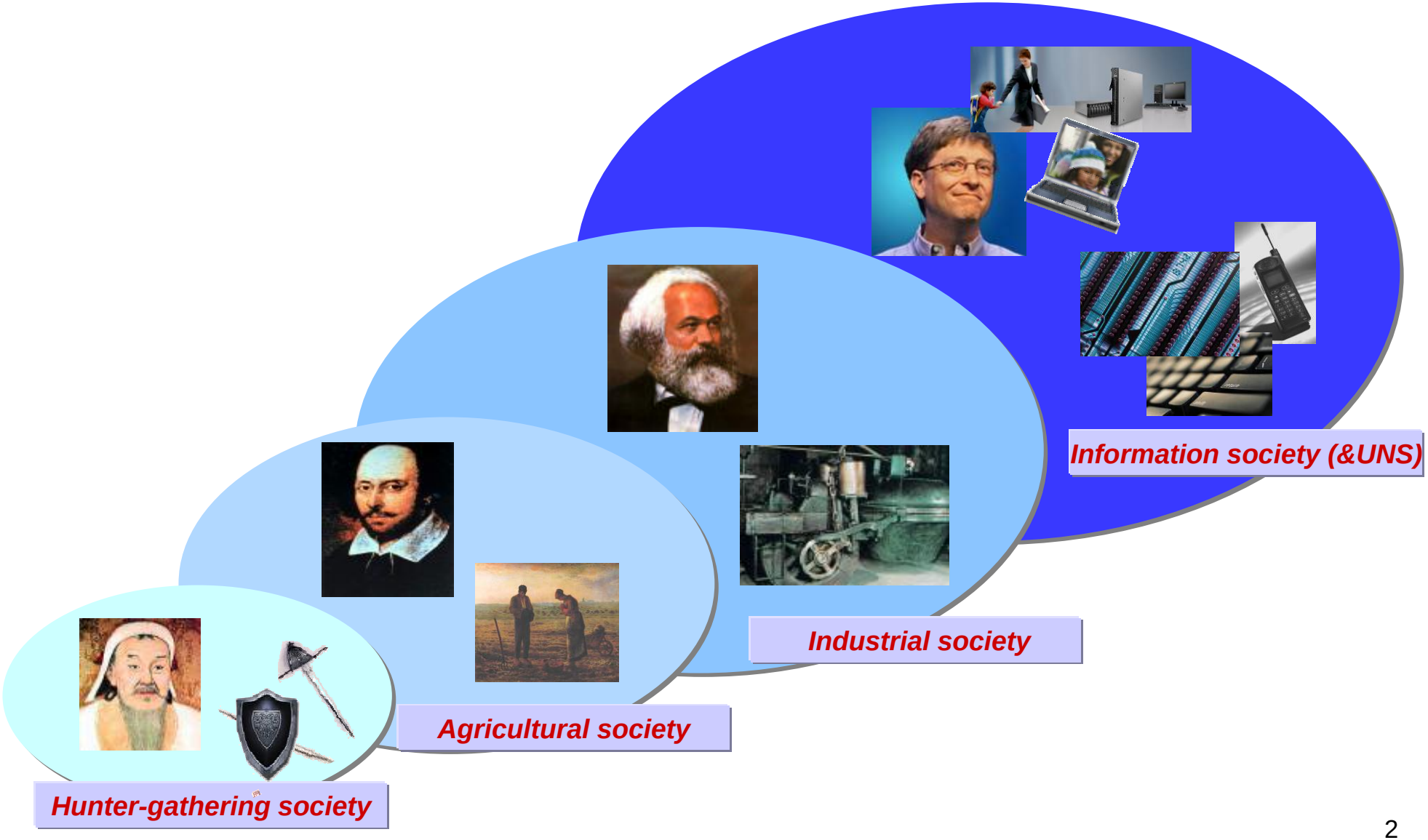
Dr. Gwo-Jiunn Huang

Executive Vice President,
Institute for Information Industry (III)

June 2006@ Taipei

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Human societies



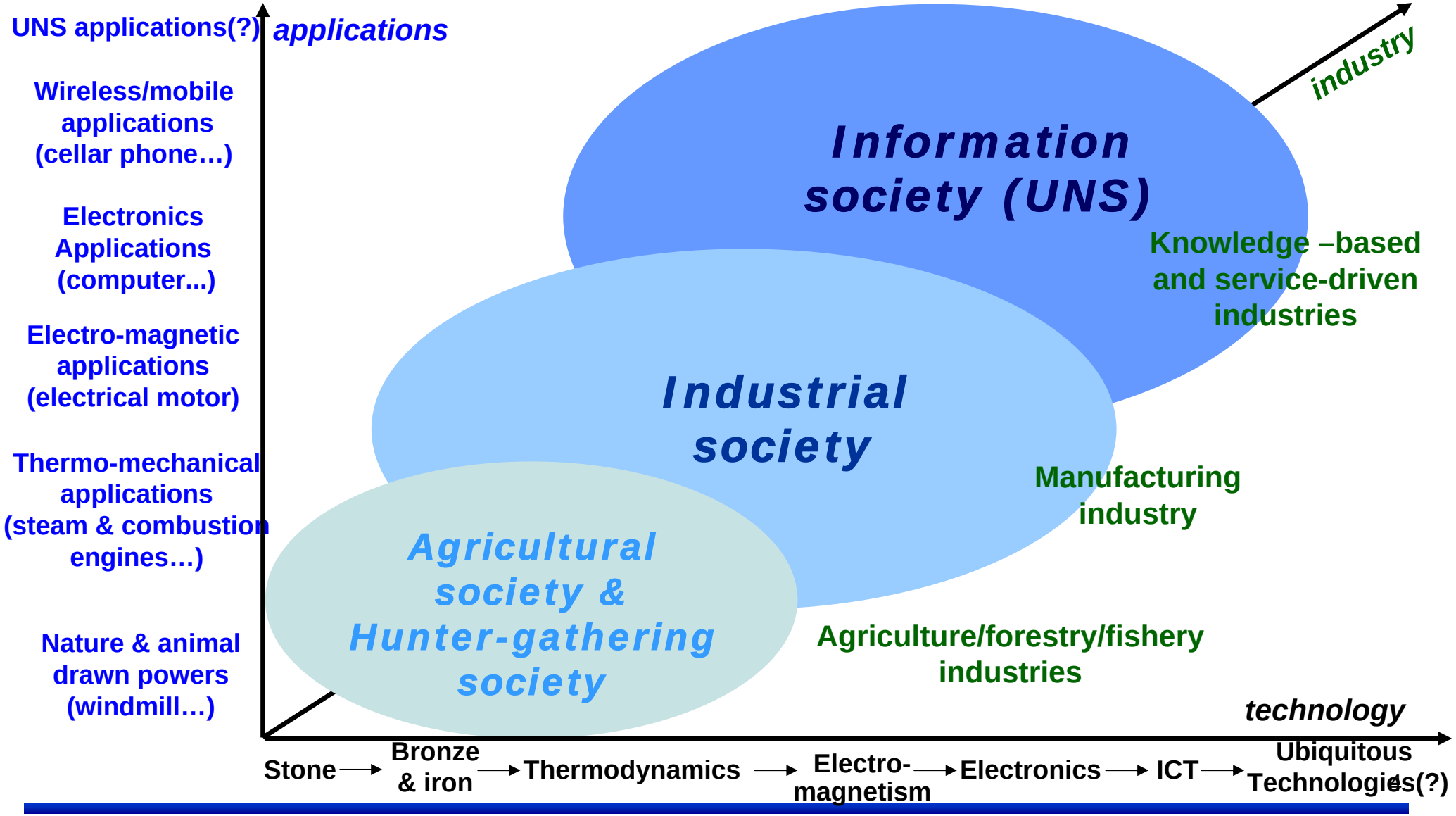
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Outline

- ☞ ***Introduction***
 - ***- the e-world around us***
- ❖ ***Why Taiwan matters?***
 - ***- the e-state we are in***
- ❖ ***The way forward***
 - ***- and the challenges lie ahead***
- ❖ ***Building the ubiquitous network society***
 - ***- with all-embracing e-services***
- ❖ ***Closing remarks***
 - ***- a vision and mission statement***

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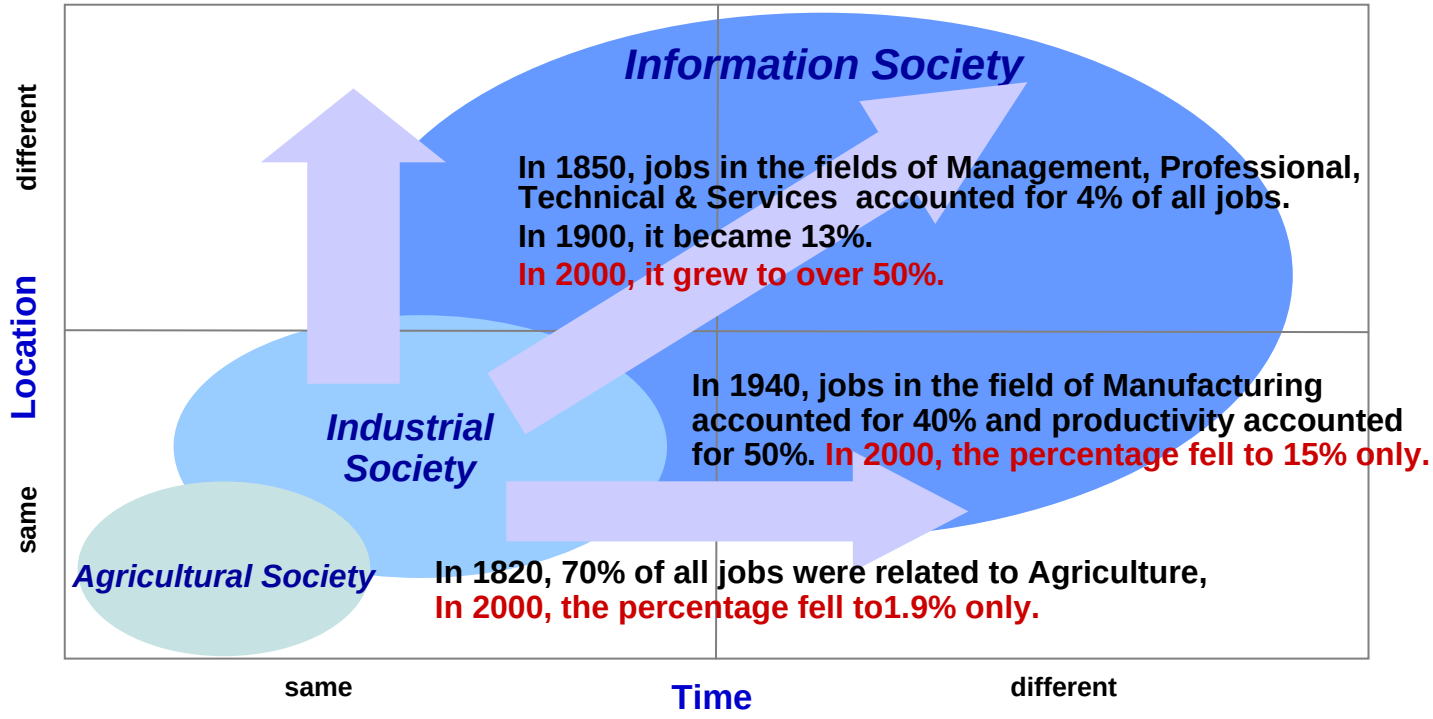
Industrial & social paradigm shifts



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From “nuts & bolts” to “bits & bytes”

- “*The hand-mill gives you society with the feudal lord; the steam-mill, society with the industrial capitalist*.”
- In the accelerated globalization process of the last decades, “*Information*” and “*Knowledge*” have become the decisive factors in determining a nation’s competitiveness.



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What's happening around us?




technological innovation



Industrial paradigm shift

&

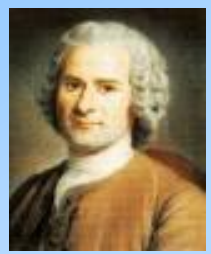
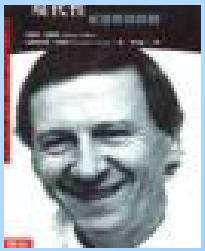



Social paradigm shift




Industrial Revolution

&

Enlightenment & rationalism

&




Renaissance in a more profound way

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The brave new world of our own making
e-scenario (application): convergence

Content
Graphics
Video
Music
Publications
…

Information Technology

Education
Culture
Commercial Application
Entertainment
Art

Digital Processing Technology (Content Creation, Formatting Standards, Data Compression, Special Effects Processing, Graphics Operation)

Digital Content
Text
Software
Graphs
Music
Audio and Video
…

Computer Animation
Gaming Software
Education Content
Audio & Video
Mobile Content
Content Software
…
Publication Archive

DC Products

Information Technology

Content Circulation & Protection Technology (Content, Bandwidth, and Copyright Management, Streaming Technology, Payment Mechanisms)

Internet Service
Value-Added Web Services
Content Providers
e-Commerce Services
Security Services
…

Internet Services
(Cable, Wireless)

Broadcast Medium
Internet
Cable TV
Digital Broadcast
Mobile Communication
…

Internet
Cable TV
TV
Movie
Digital Storage (CD/DVD/…)
Satellite Communications
Digital Broadcast
Mobile Communication Networks

DC Services

Reception Equipment
PC
TV Set
PDA
…





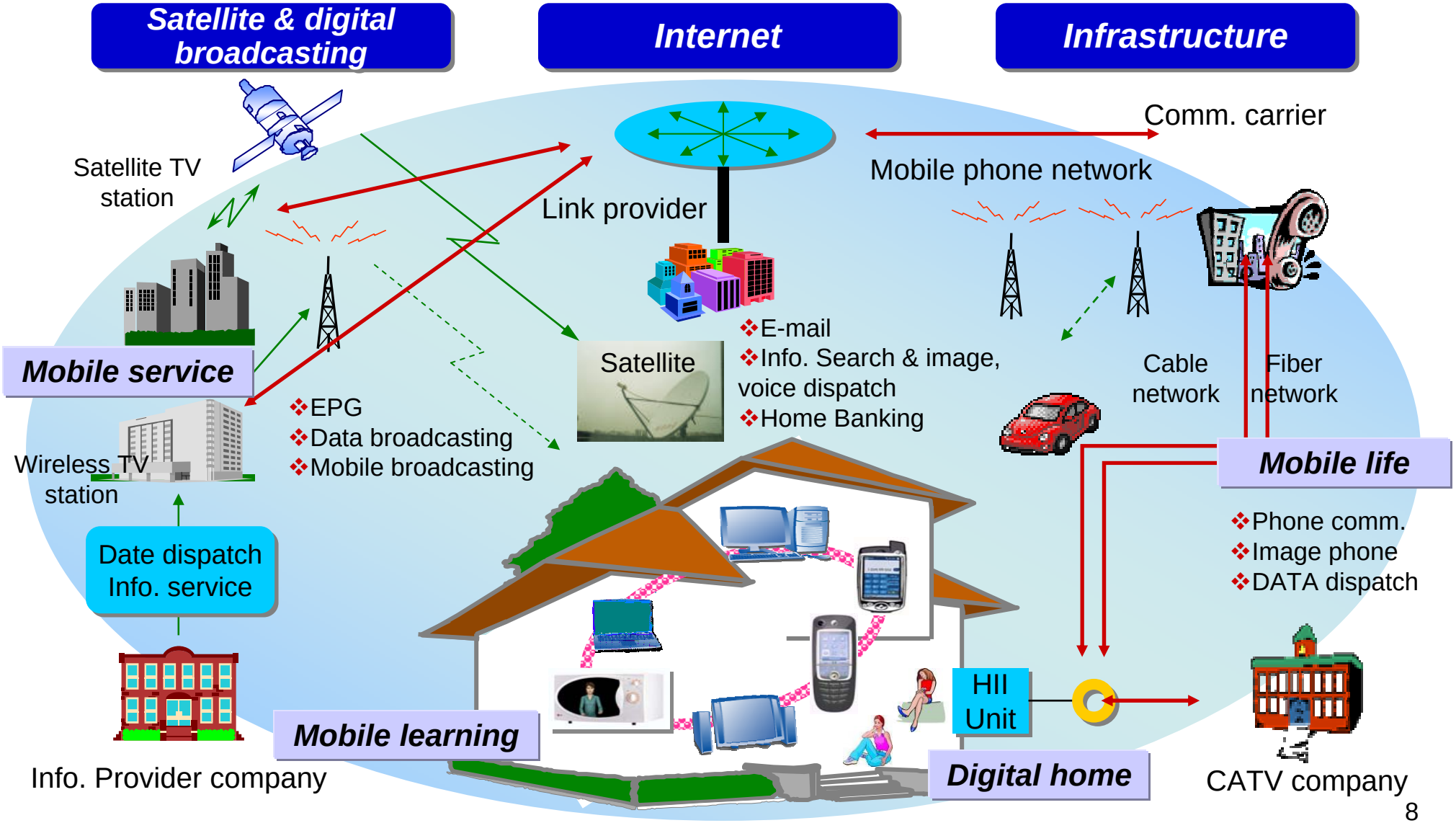


Source: DCIPO, MOEA, Taiwan

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The brave new world of our own making

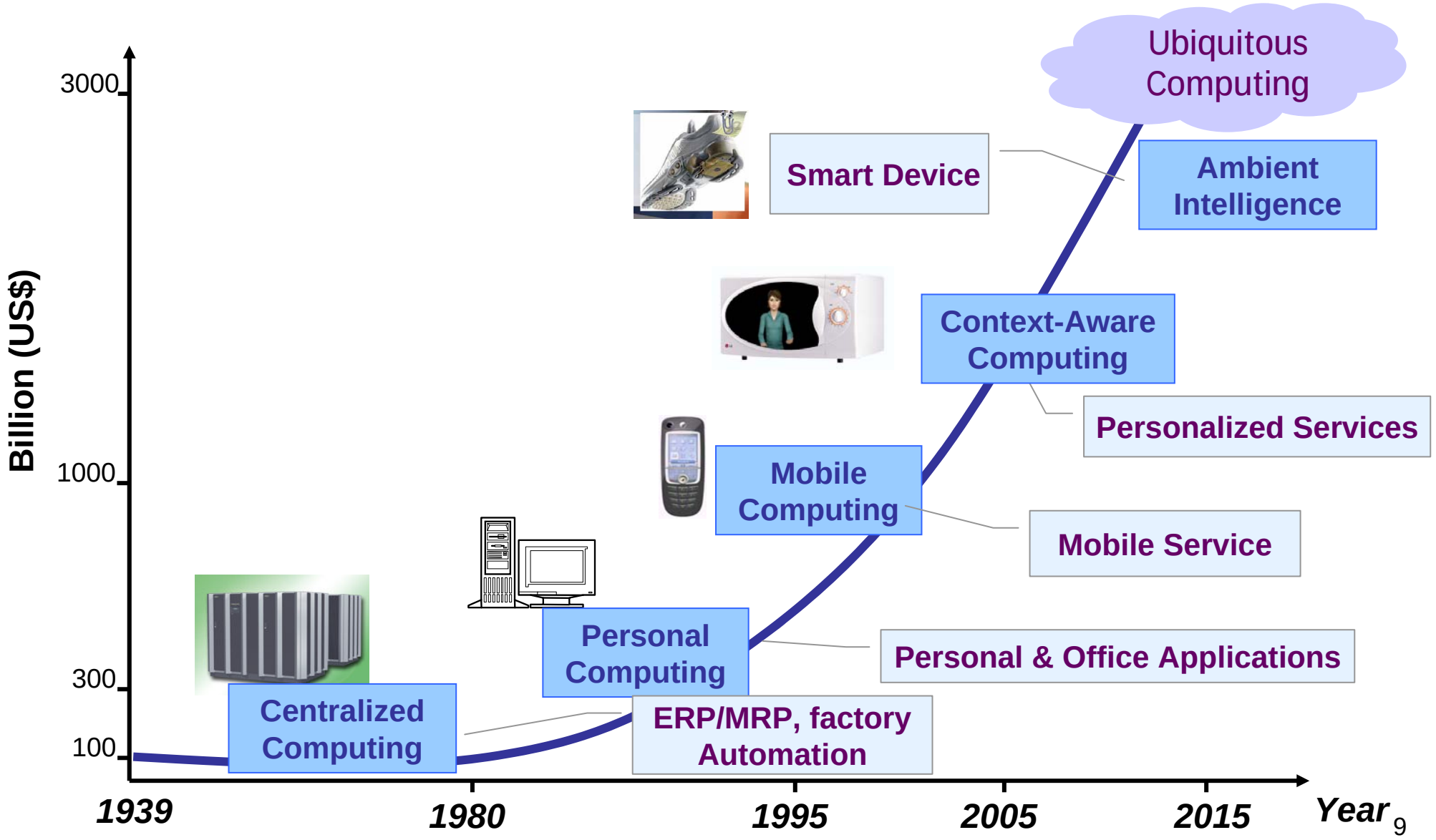
e-scenario (application): ubiquity



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The brave new world of our own making

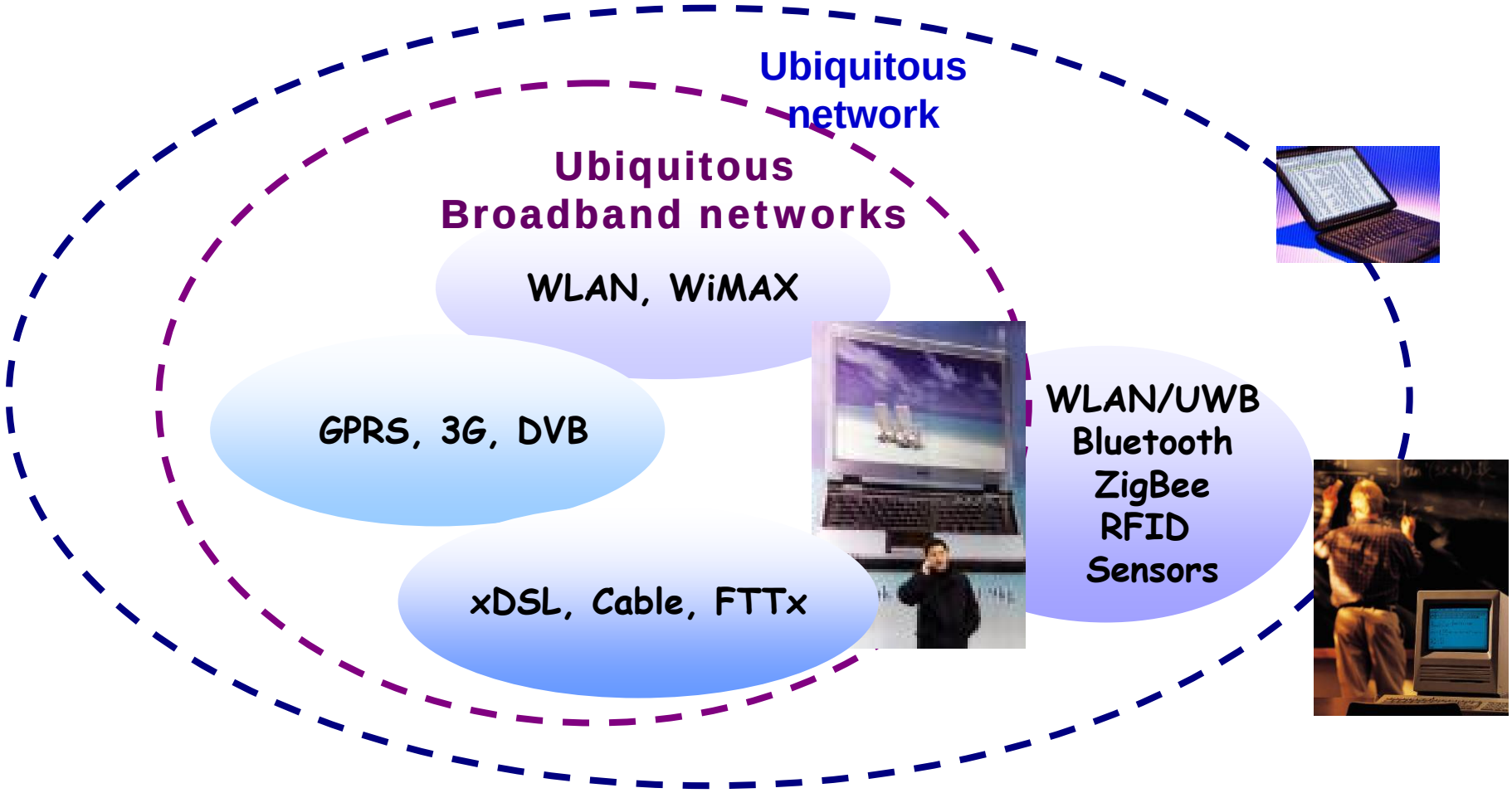
e-scenario (technology): ambient intelligence



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The brave new world of our own making

e-scenario (technology): ubiquitous network

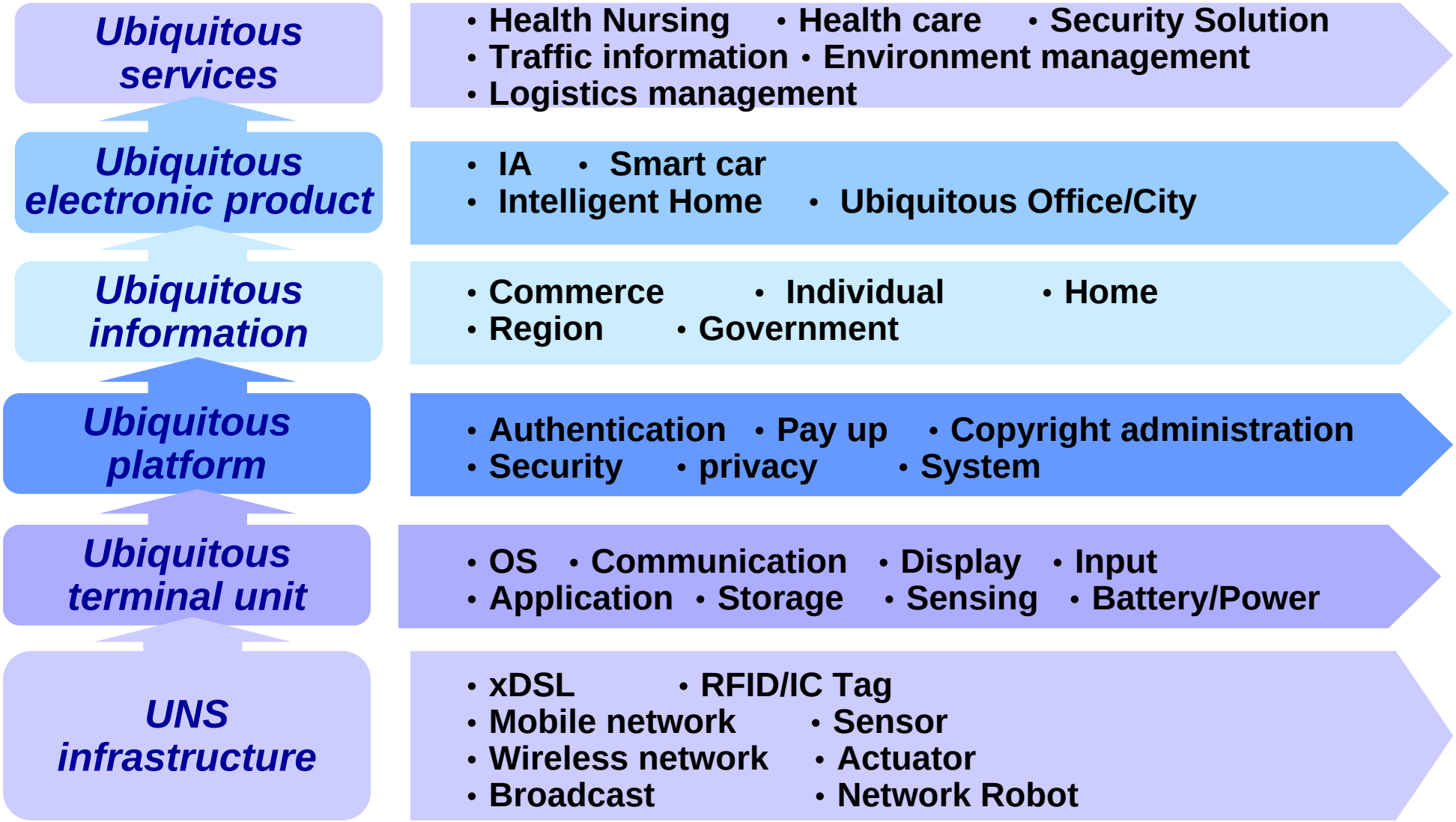


people to object → people to people → object & object

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The brave new world of our own making

e-scenario (industry): UNS-driven industrial sectors



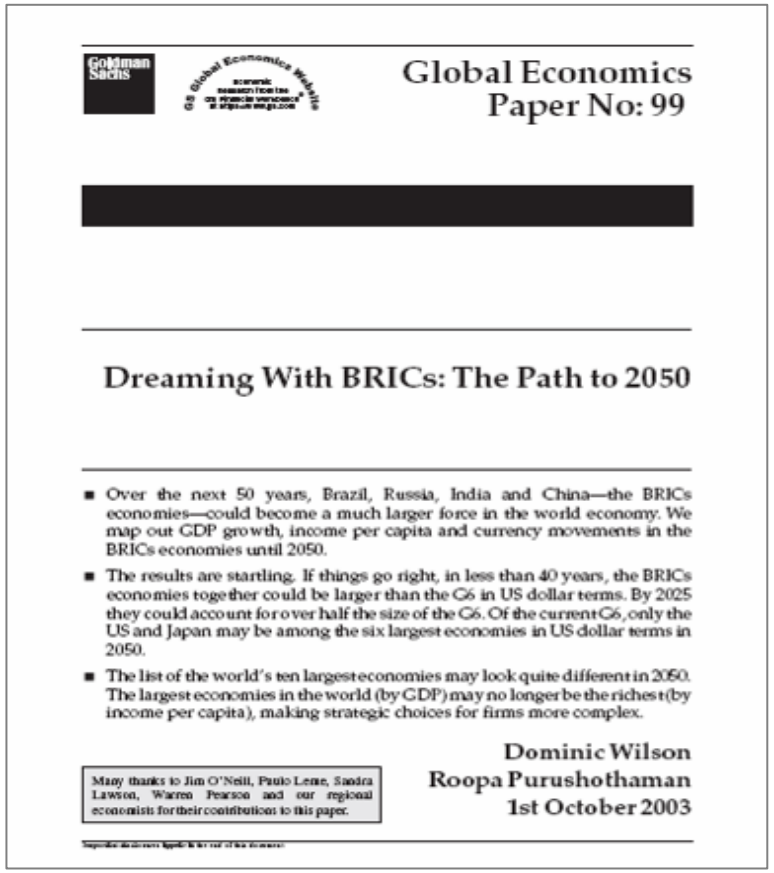
Source: 村上輝康、ユビキタスネットワーク環境を日本にどう実現するか、知的資産創造、2003年5月

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BRICs: vision or illusion?







Goldman Sachs

Global Economics Paper No: 99

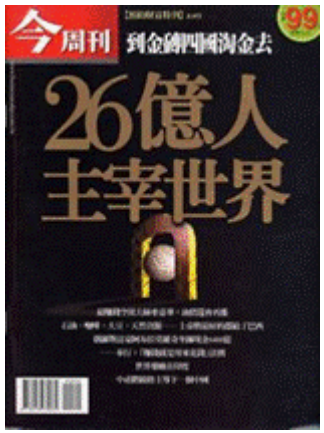
Dreaming With BRICs: The Path to 2050

- Over the next 50 years, Brazil, Russia, India and China—the BRICs economies—could become a much larger force in the world economy. We map out GDP growth, income per capita and currency movements in the BRICs economies until 2050.
- The results are startling. If things go right, in less than 40 years, the BRICs economies together could be larger than the G6 in US dollar terms. By 2025 they could account for over half the size of the G6. Of the current G6, only the US and Japan may be among the six largest economies in US dollar terms in 2050.
- The list of the world's ten largest economies may look quite different in 2050. The largest economies in the world (by GDP) may no longer be the richest (by income per capita), making strategic choices for firms more complex.

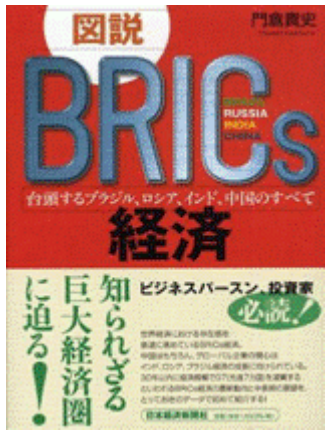
Many thanks to Jim O'Neill, Paulo Leme, Sandra Lawson, Warren Pearson and our regional economists for their contribution to this paper.

Dominic Wilson
Roopa Purushothaman
1st October 2003



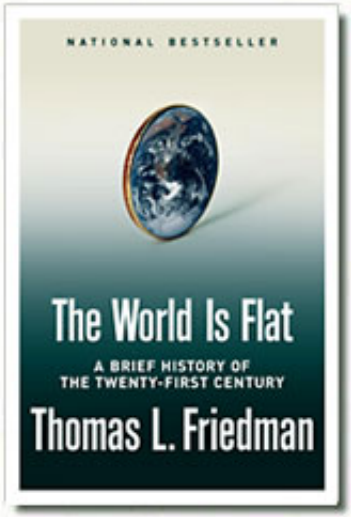


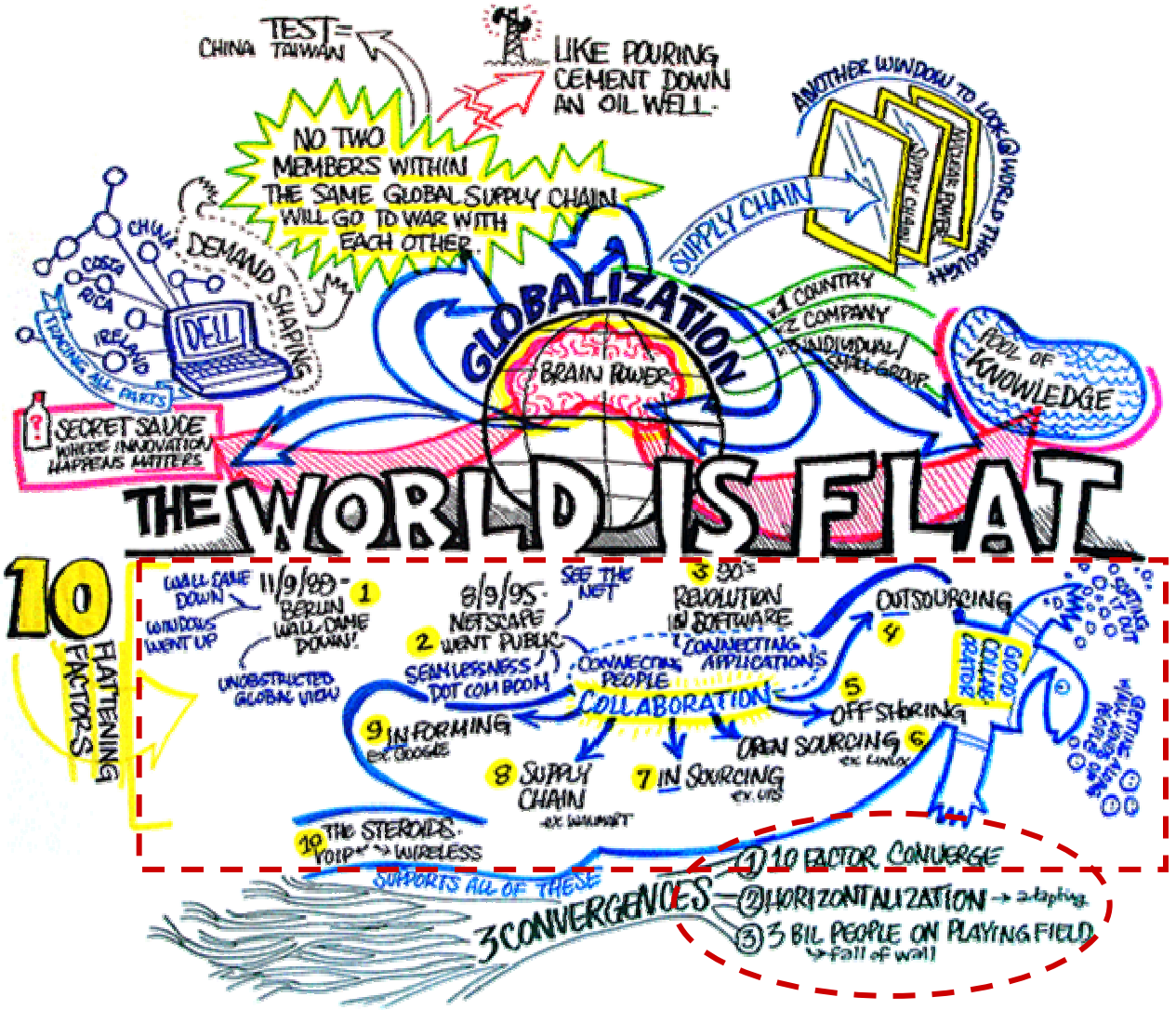




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Background: the world is flat yet again
an uncharted ocean





Source: “The World is Flat”, Thomas L. Friedman

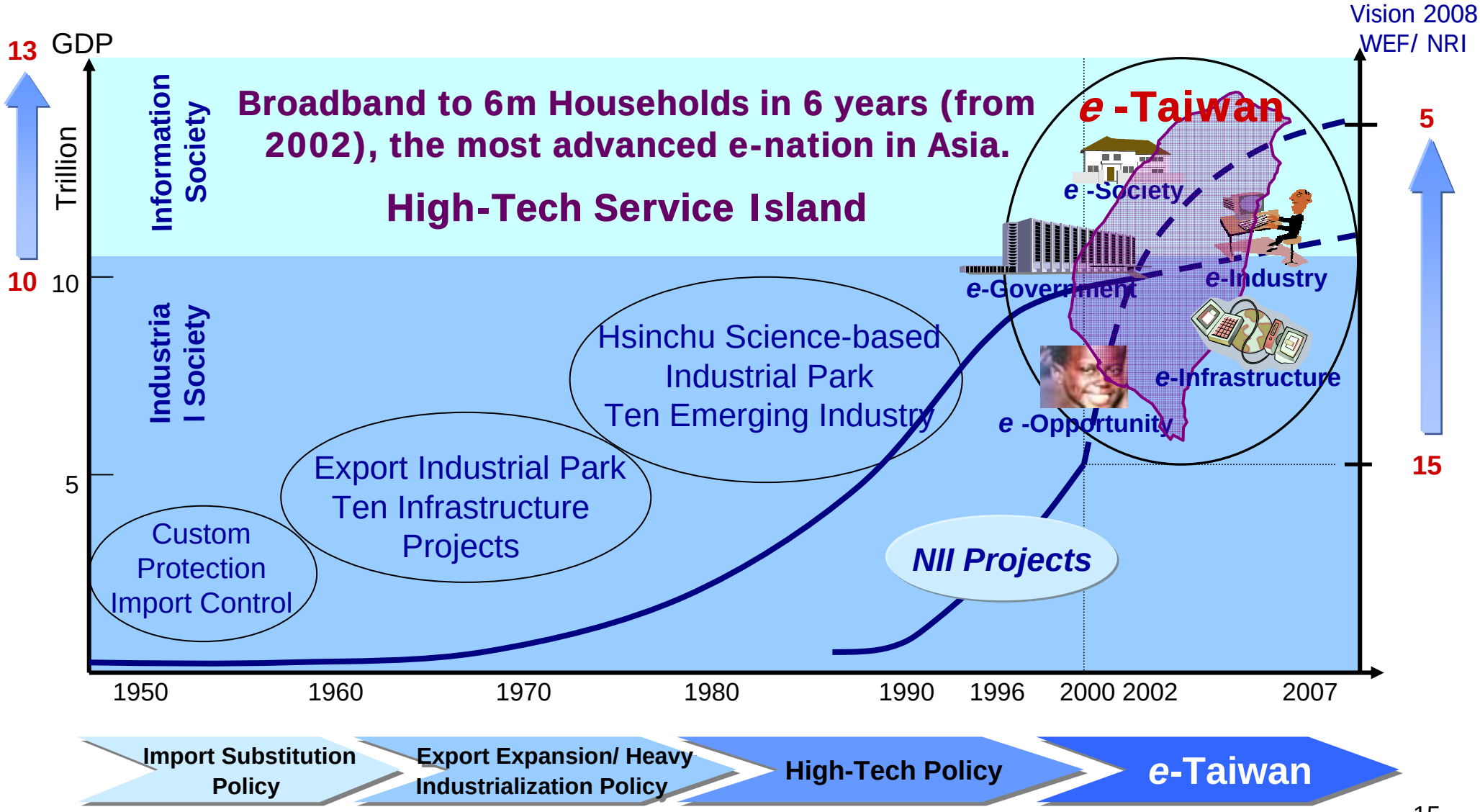
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a long journey into the e-Taiwan



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Taiwan's global competitiveness

Country	2005	2004	Changes	Country	2005	2004	Changes
Finland	1	1	0	Netherlands	11	12	1
United States	2	2	0	Japan	12	9	-3
Sweden	3	3	0	United Kingdom	13	11	-2
Denmark	4	5	1	Canada	14	15	1
Taiwan	5	4	-1	Germany	15	13	-2
Singapore	6	7	1	New Zealand	16	18	2
Iceland	7	10	3	Korea, Rep.	17	29	12
Switzerland	8	8	0	United Arab Emirates	18	16	-2
Norway	9	6	-3	Qatar	19	n/a	n/a
Australia	10	14	4	Estonia	20	20	0

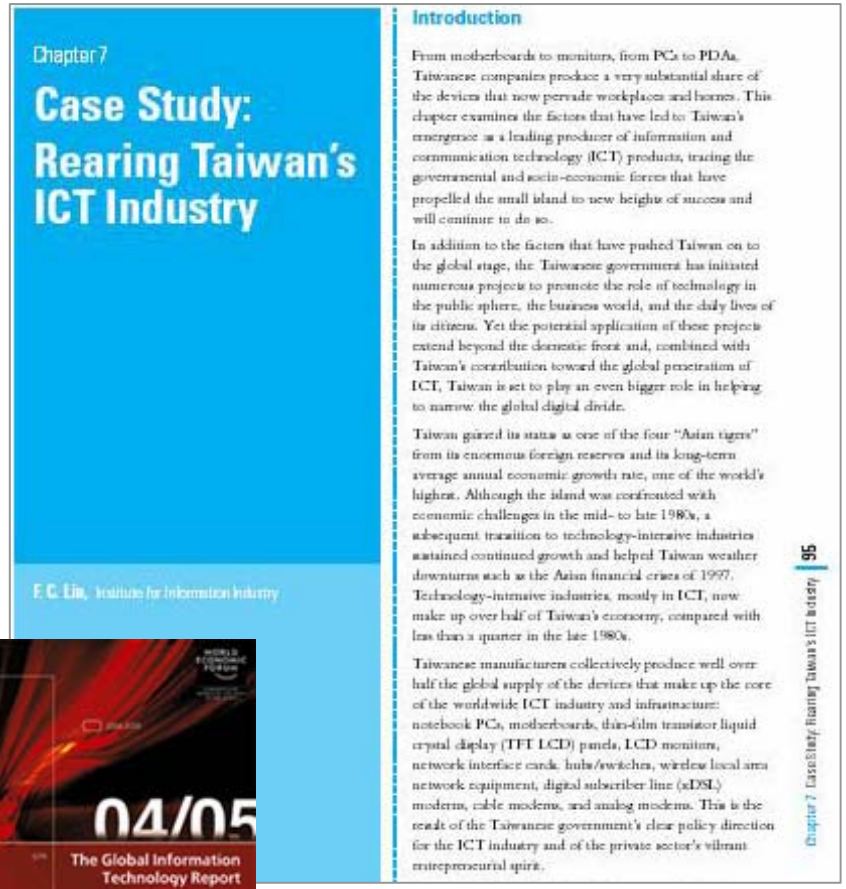
- According to the recent Global Competitiveness Report 2005-2006, released by the WEF, **Finland** remains the most competitive economy in the world and tops the rankings for the third consecutive year. The **US** is in second position, followed by **Sweden**, **Denmark**, **Taiwan** and **Singapore**;
- Other Asian countries rank of position: **Japan (12), Korea (17), Hong Kong (28), China (49).**

Source: WEF/The Global Competitiveness Report 2005-2006

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WEF Global Information Technology Reports

WEF Global Information Technology Report 2004-2005



Chapter 7

Case Study: Rearing Taiwan's ICT Industry

F. C. Lin, Institute for Information Industry

Introduction

From motherboards to monitors, from PCs to PDAs, Taiwanese companies produce a very substantial share of the devices that now pervade workplaces and homes. This chapter examines the factors that have led to Taiwan's emergence as a leading producer of information and communication technology (ICT) products, tracing the governmental and socio-economic forces that have propelled the small island to new heights of success and will continue to do so.

In addition to the factors that have pushed Taiwan on to the global stage, the Taiwanese government has initiated numerous projects to promote the role of technology in the public sphere, the business world, and the daily lives of its citizens. Yet the potential application of these projects extend beyond the domestic front and, combined with Taiwan's contribution toward the global penetration of ICT, Taiwan is set to play an even bigger role in helping to narrow the global digital divide.

Taiwan gained its status as one of the four "Asian tigers" from its enormous foreign reserves and its long-term average annual economic growth rate, one of the world's highest. Although the island was confronted with economic challenges in the mid- to late 1980s, a subsequent transition to technology-intensive industries sustained continued growth and helped Taiwan weather downturns such as the Asian financial crisis of 1997. Technology-intensive industries, mostly in ICT, now make up over half of Taiwan's economy, compared with less than a quarter in the late 1980s.

Taiwanese manufacturers collectively produce well over half the global supply of the devices that make up the core of the worldwide ICT industry and infrastructure: notebook PCs, motherboards, thin-film transistor liquid crystal display (TFT LCD) panels, LCD monitors, network interface cards, hubs/switches, wireless local area network equipment, digital subscriber line (xDSL) modems, cable modems, and analog modems. This is the result of the Taiwanese government's clear policy direction for the ICT industry and of the private sector's vibrant entrepreneurial spirit.

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Chapter 7: Case Study: Rearing Taiwan's ICT Industry

INSEAD

04/05

The Global Information Technology Report

001

- ***Executive Summary—Taiwan and Emergence of ICT Giant***
- ***Chapter 7--Case Study: Rearing Taiwan's ICT Industry (by F.C.Lin/III)***

WEF Global Information Technology Report 2005-2006



CHAPTER 3.3

The Impact of Information and Communication Technologies on the Economic Competitiveness and Social Development of Taiwan

ARTHUR L. DAHL, International Environment Forum
AUGUST LOPEZ-CLAROS, World Economic Forum

Background on the development of the ICT sector

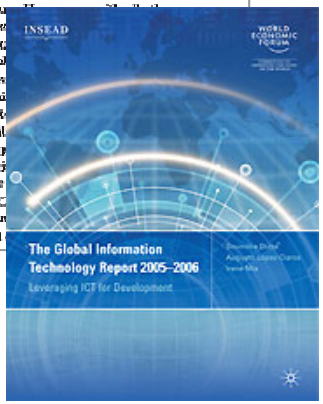
A half-century ago, Taiwan was a resource-poor underdeveloped tropical island. Through sustained good policies over the past few decades, it has lifted its population from poverty, joining the ranks of the most prosperous and competitive economies in the world. Unlike Korea, Thailand, Indonesia, Malaysia and Hong Kong, it was able to weather quite unscathed the Asian financial crisis in 1997. Today Taiwan is a technological powerhouse that ranks among the world's top producers of notebook personal computers, flat panel displays, modems, motherboards, and other electronic components and products. In 2004 it ranked fourth globally in the production value of its IT hardware.[1] It is also fifth in the World Economic Forum's 2005–2006 Global Competitiveness rankings, with a strong showing in the area of technology and innovation, ranking 3rd in the world in the technology index. The *2005–2006 Global Competitiveness Report* highlights Taiwan's exceptional strength in technology issues, including an impressive capacity for innovation, firm-level technology absorption, university/industry collaboration in research, and its pre-eminent position in the use of the latest technologies, from mobile telephones to personal computers and the Internet. This chapter explores some of the principal factors that have contributed to its success, which might well serve as a model for countries striving to improve their performance and competitiveness in information and communication technologies.

Taiwan's transition from a poor agricultural society into an increasingly sophisticated powerhouse of high-technology manufacturing and the world's leading producer of information and communication technology products is, without doubt, one of the most compelling development stories of the past half century. [illegible] countries that wish to make [illegible] authorities will have to recognize [illegible] further improvements in [illegible] institutions by increasing [illegible] area. Taiwan should in certain [illegible] ranks of the Nordic countries [illegible] matched their technological [illegible] their levels of efficiency in [illegible]

In his case study on Taiwan [illegible] *Information Technology Report* [illegible] the evolution of Taiwan's ICT [illegible] economic miracle of Taiwan [illegible] agricultural to an industrial [illegible]

3.3: Economic Competitiveness and Social Development of Taiwan

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INSEAD

WORLD ECONOMIC FORUM

The Global Information Technology Report 2005–2006

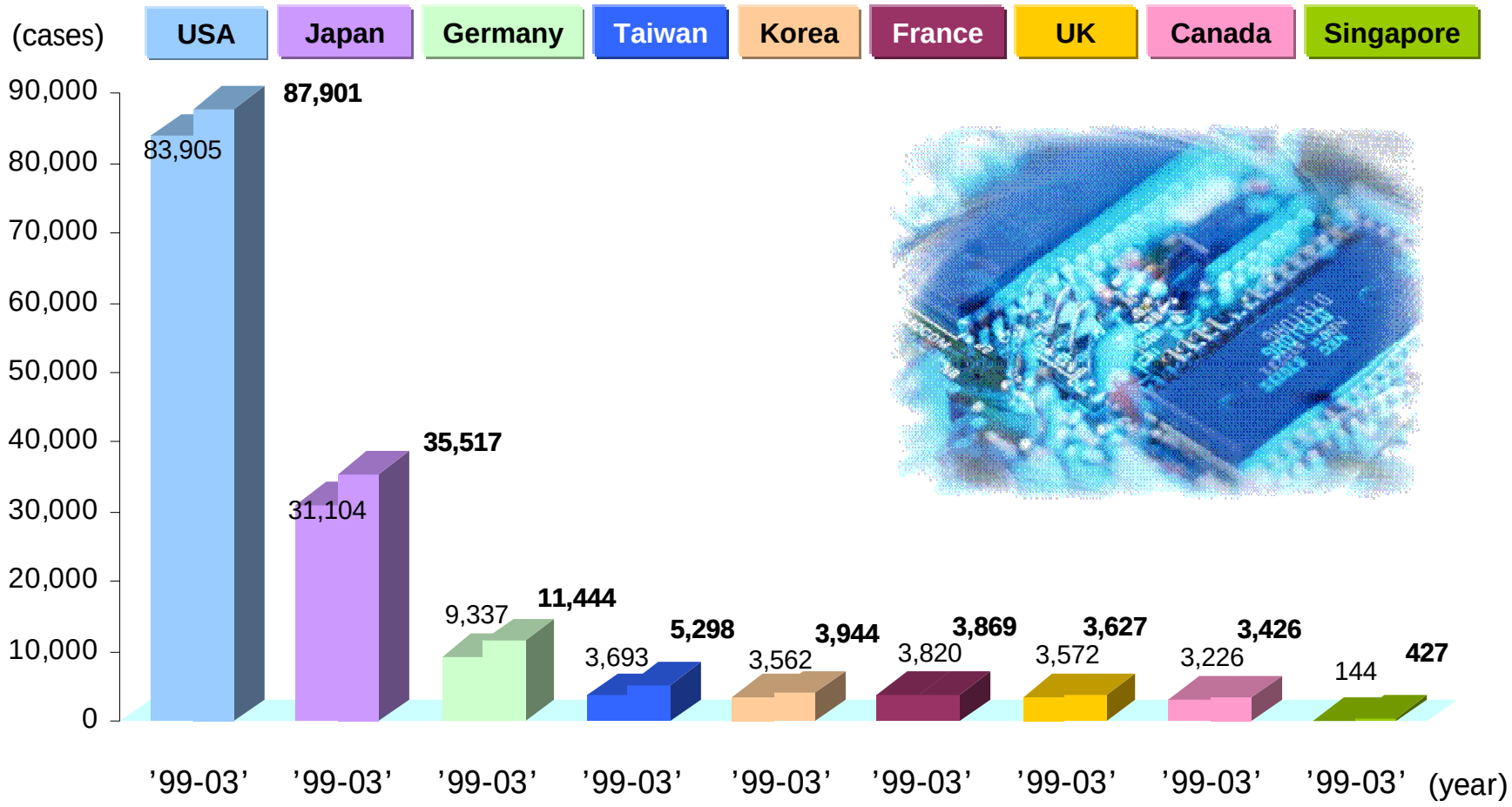
Leveraging ICT for Development

- ***Chapter 3.3--The Impact of ICT on Economic Competitiveness and Social Development of Taiwan***

Source: WEF Global Information Technology Report 2004-2005& 2005-2006

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Number of U.S. patents granted



Source: Indicators of Science and Technology, Taiwan, 2004

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Taiwan's e-Readiness- (WEF/NRI) ranking

WEF/NRI Rank					WEF/NRI Rank			
Country	2005	2004	Changes		Country	2005	2004	Changes
US	1	5	4		Hong Kong	11	7	4
Singapore	2	1	-1		Netherland	12	16	4
Denmark	3	4	1		Norway	13	13	0
Iceland	4	2	-2		Korea	14	24	10
Finland	5	3	-2		Australia	15	11	-4
Canada	6	10	4		Japan	16	8	-8
Taiwan	7	15	8		Germany	17	14	-3
Sweden	8	6	-2		Austria	18	19	1
Switzerland	9	9	0		Israel	19	16	-3
UK	10	12	2		Ireland	20	22	2

- According to the recent Global Information Technology Report 2005-2006, released by the WEF, **US** remains the most competitive economy in the world and tops the rankings for the third consecutive year. The **Singapore** is in second position, followed by **Denmark, Iceland, Finland**, **Canada** and **Taiwan**;
- Other Asian countries rank of position: **Singapore (2), Hong Kong (11), Korea (14), Australia (15), Japan (16).**

Source: WEF NRI/The Global Information Technology Report, 2005~2006

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Development issues in Taiwan

Globalization

- Globalized knowledge-based economy; winners and losers
- Tense competition of the supply of raw materials vs. sustainability
- “The world is flat”; outsourcing and near-/off-shoring trends
- Regional economic blocks; strategic alliances
- Korea, BRICs & others; fast growing…

The black-hole effect of China

- Low labor price and land cost, huge internal market and heavy incentive program help to attract global investment and technological resources into China.
- AFTA (ASEAN Free Trade Area; ASEAN+N) speeds up the poli-economic cooperation/alliances between China and ASEAN countries…

Development issues in Taiwan

- Concern over being marginalized in the globalization process
- Key technologies/applications/services developed slowly
- Fast-increasing needs for medicare for seniors in an aging society
- Concern over ‘digital divides’, Digital human right issues
- GDP per capita remains unchanged for the last decade; whilst service industry accounts for ¾ of the GDP…



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Industrial paradigm shift

manufacturing → service

hardware → software

local → global

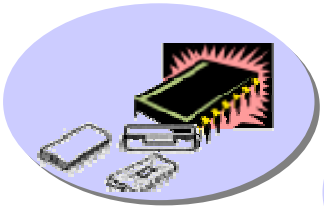
volume → value

innovation → creativity

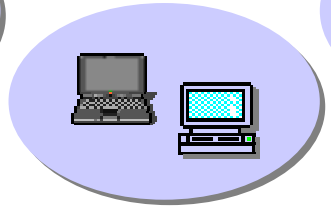
cost down → value up

scale → agility & profoundness

Three-trillion



Semiconductor

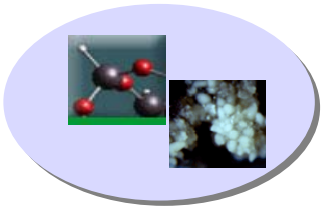


Color imaging



telecommunication

Tri-star



Biotechnology



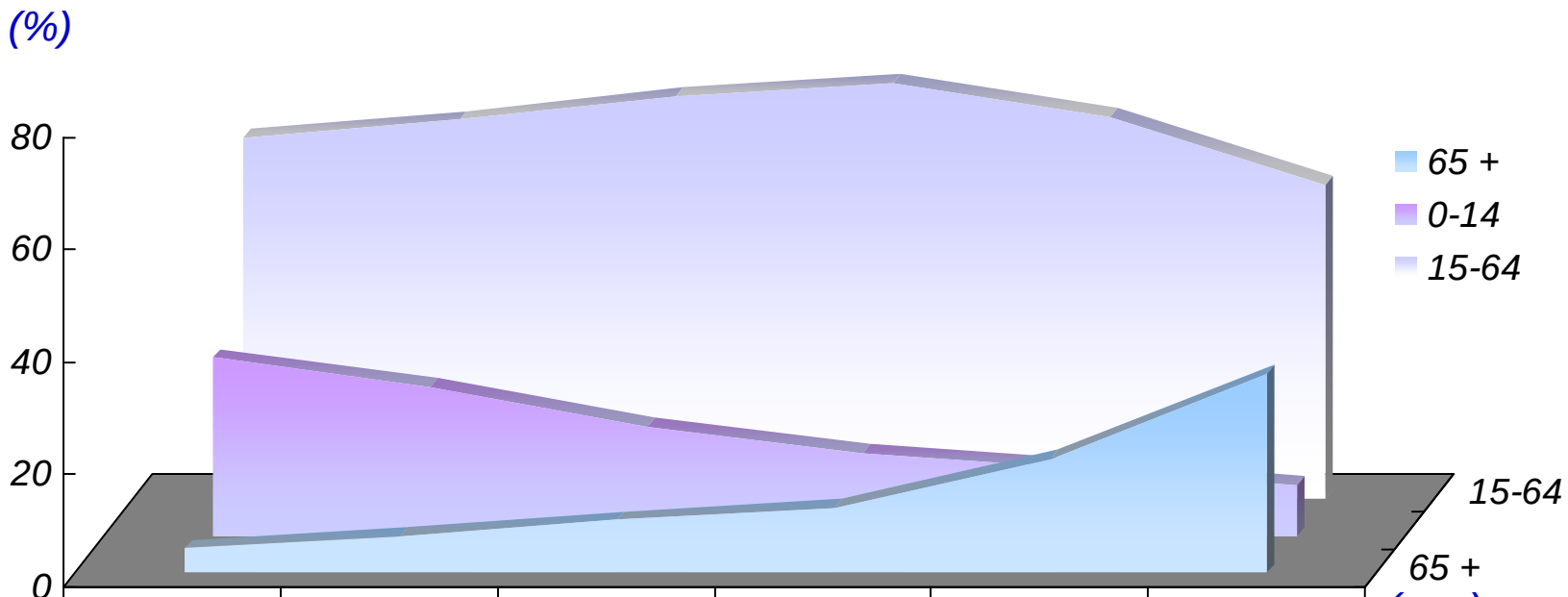
Digital content



Software & information service

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Taiwan as an aging society



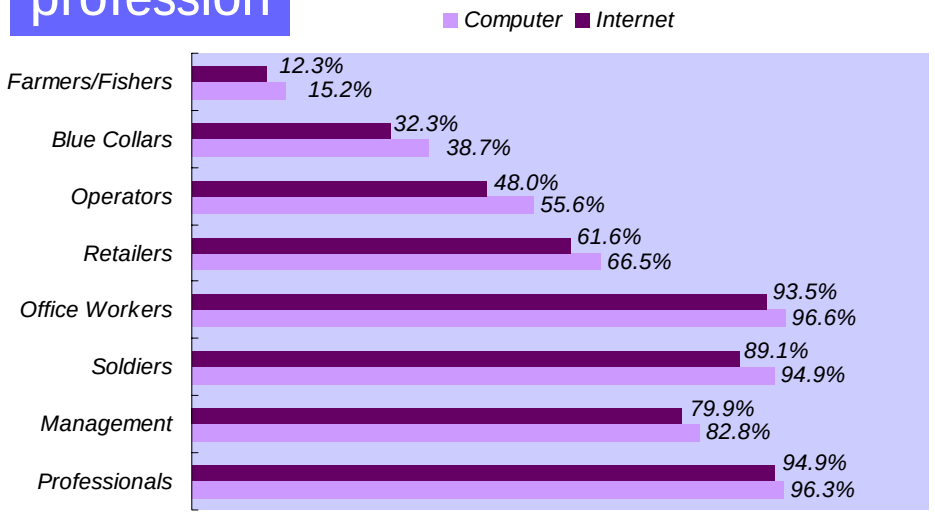
	1981	1991	2004	2014	2026	2051
65 +	4.4	6.5	9.4	11.6	20.4	35.5
0-14	31.6	26.3	19.3	14.7	12	8.9
15-64	64	67.2	71.3	73.7	67.6	55.6

Source: CEPD (Council for Economic Planning and Development), July, 2004.

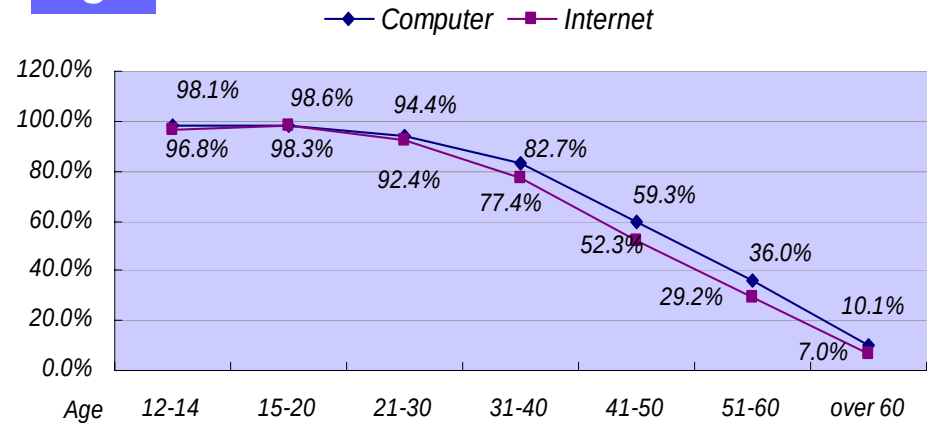
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“Digital divide” in Taiwan

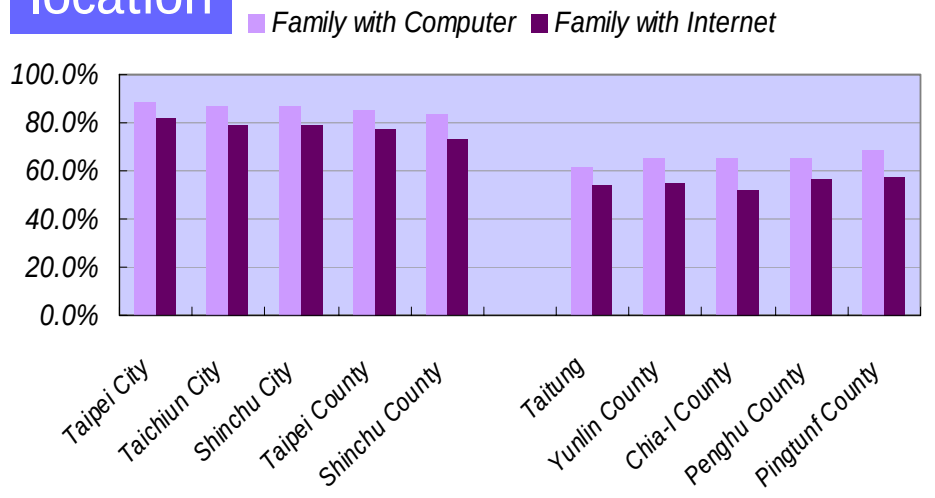
profession



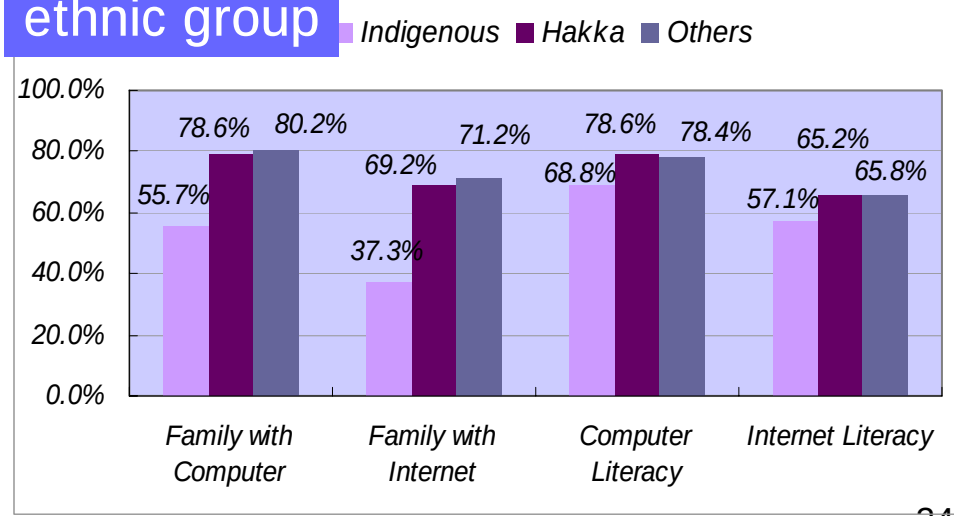
age



location



ethnic group



Source: RDEC, Executive Yuan 2005

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Development issues of Taiwan- a summary

Social Issues

- How to create a society in which each and everyone can fulfill one's potential and to actualize oneself?
- Bridging digital divide – how to transform digital divide into digital opportunities.
- Aging society with low birthrate – how to meet the caring need of senior citizens and babies?

Economic Issues

- How to boost the development of information service and ITES to create job opportunities and a higher Per Capita Income in a slow economy?
- How to meet public expectation for a healthy, safe, convenient, and carefree living with stable employment and career progression?

Safety & Security

- How to effectively utilize ICTs to ensure a better living environment that is free from disasters such as earthquakes, typhoons, major infectious diseases, fire, explosions, theft, violence, etc?

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UNS: a vision statement



Ubiquitous Network Society

in Taiwan

Utilizing ICT to make Taiwan a convenient, safe and secure society

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a convenient, safe and secure society

Food

Food Chain Traceability

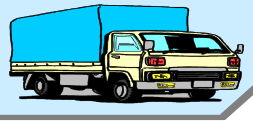
RFID Tag

Barcode

origin



delivers



process



market



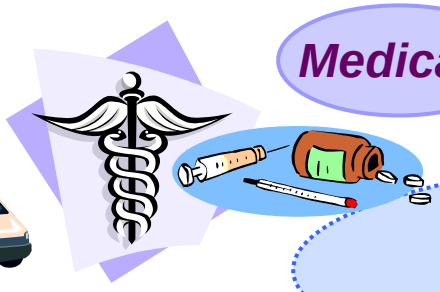
Barcode

dining table



Medicare





entertai nment



Ubiquitous Network Society

Learning



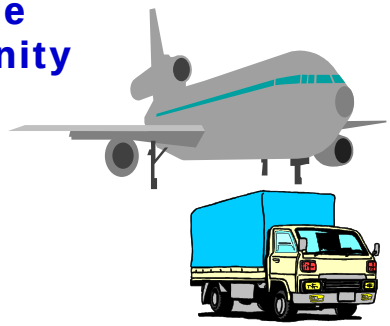
e-Learning

Housing

Smart and Secure community



Transpor tation



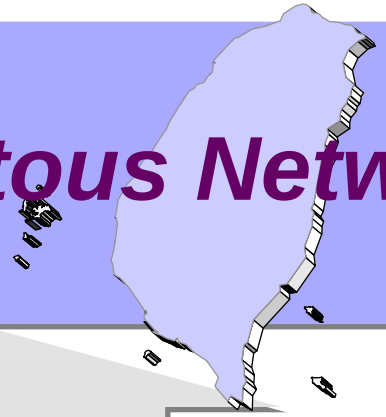


Intelligent Traffic Information System

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UNS: a mission statement

Ubiquitous Network Society



e-Taiwan / M-Taiwan (2004~)

Second Phase: From the users' point of view, advance the e-usage/applications

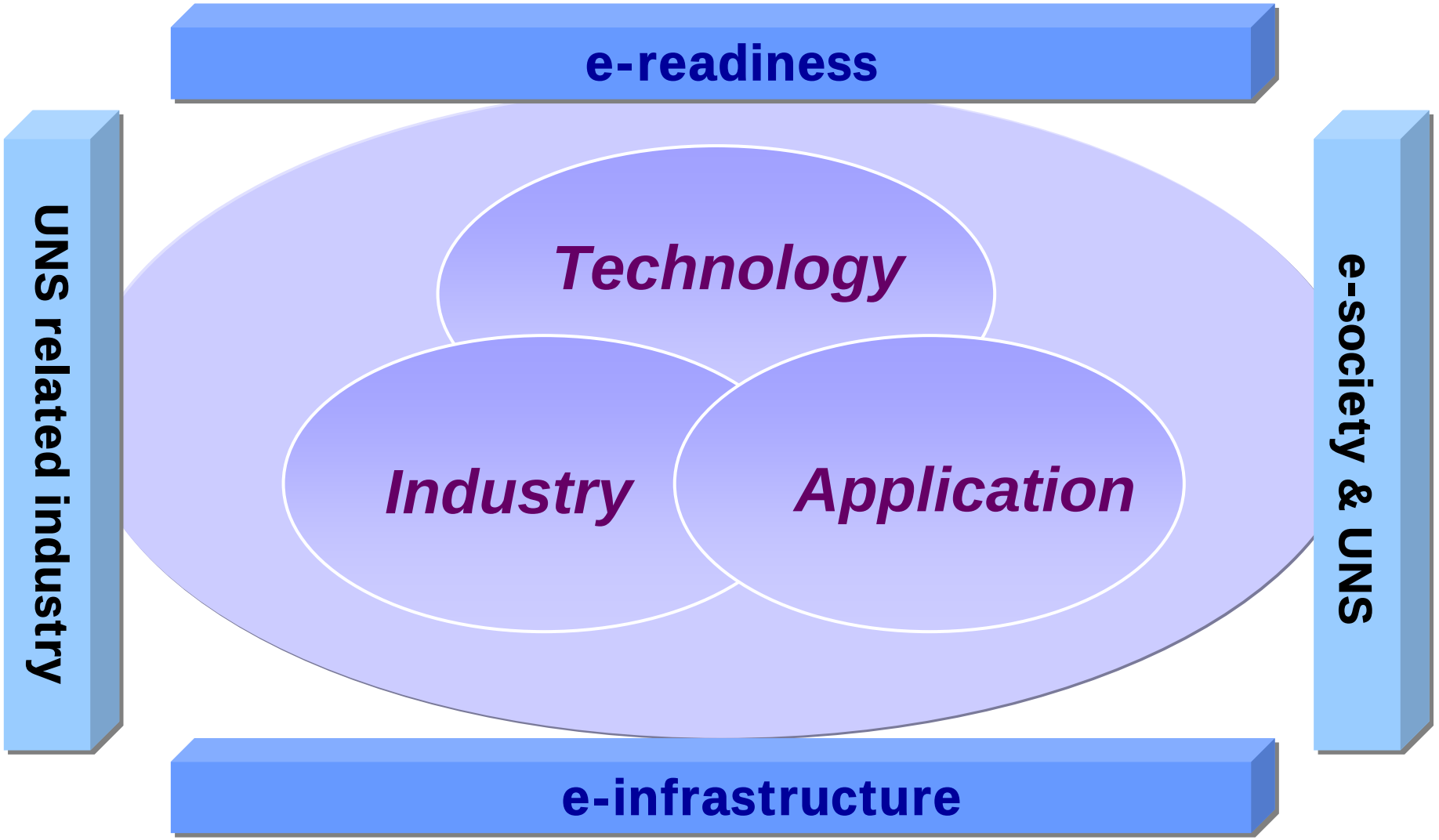
Japan & Korea plan *UNS programmes*

e-Taiwan *(2002~)*

First Phase：Build ICT infrastructure, online government/industrial service enhancement

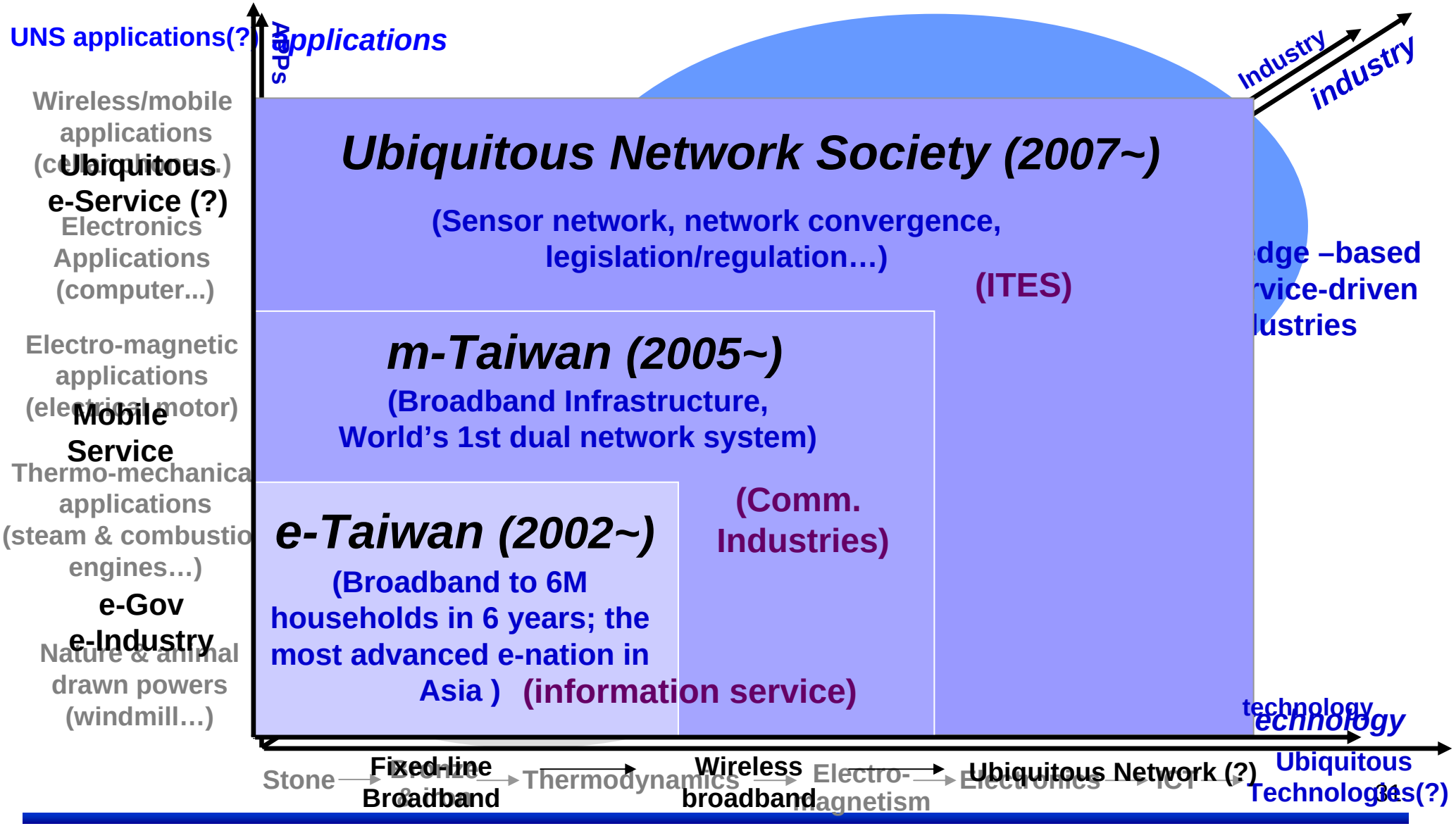
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UNS: application, industry & technology



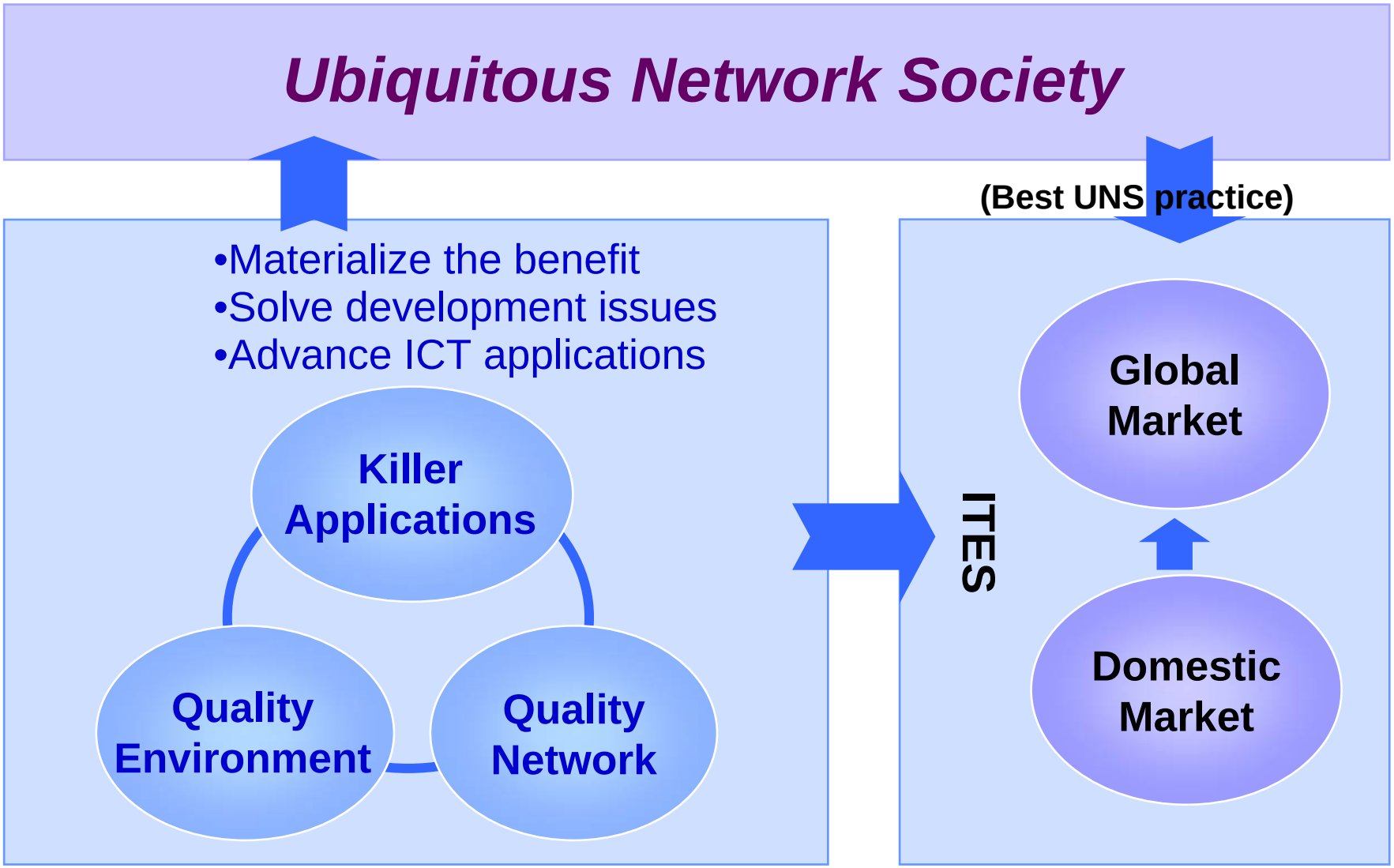
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UNS: a brief history



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UNS: the strategy



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The Economists' perspectives

Economist.com





Behind the digital divide
Mar 10th 2005
Mobile phones can boost development in poor countries—if governments let them

The real digital divide
Mar 10th 2005
Encouraging the spread of mobile phones it the most sensible and effective response to the digital divide



Mobile phones and development
Jul 7th 2005
Mobile phones can boost development in poor countries—if governments let them

Source: EIU, 2005

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International efforts to bridge "Digital Divide"

- The "**Digital Opportunity Task Force**" (the DOT Force) was proposed by Leaders at the **G8** Kyushu-Okinawa Summit in July **2000**.
- The **2001 APEC** meeting treated bridging **"Digital Divide"** as a critical issue in its agenda, where Taiwan proposed "Transforming the digital divide into digital opportunities" and was welcomed.

 Taiwan advocated the establishment of an **ADOC** at the 11th APEC Economic Leaders' meeting in Bangkok, **2003**. The proposal was welcomed and reflected in the Chair's summary.
- The **2003 WSIS** in Geneva listed "**How Digital Divide is preventing equal sharing of opportunities concerning ICTs**" as their opening meeting discussion. **WSIS round II** is to be held in Tunis this December.
- March 2005, UN launched a **"Digital Solidarity Fund"** to finance projects that address "the uneven distribution and use of new ICTs".
- **and more…**

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WSIS: Building the Information Society

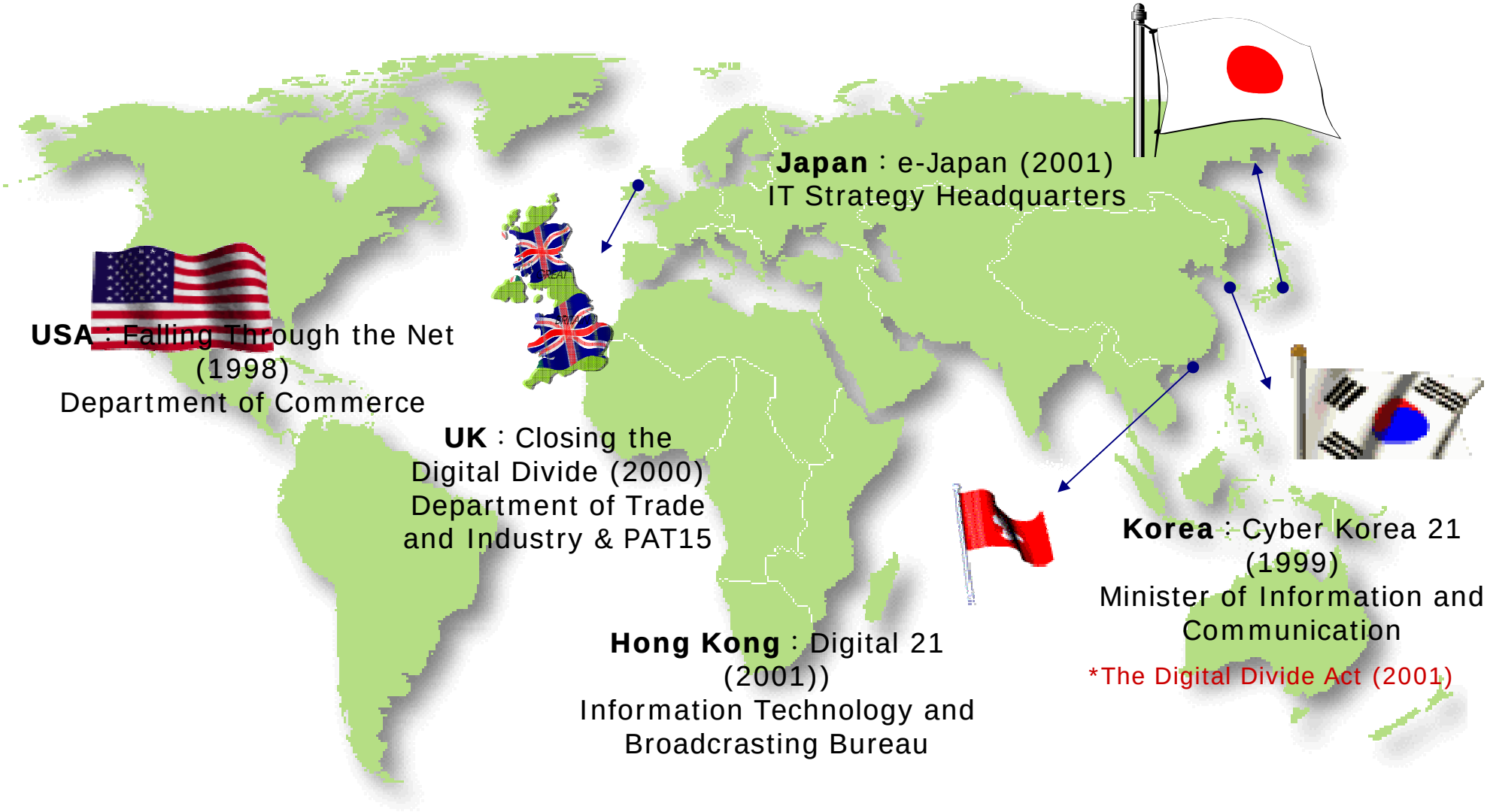
- Vision：***build a people-centred, inclusive and development-oriented Information Society, where everyone can create, access, utilize and share information and knowledge, enabling individuals, communities and peoples to achieve their full potential in promoting their sustainable development and improving their quality of life, premised on the UN Declaration of Human Rights.***
- **WSIS Geneva (2003) Declaration: reaffirm the *Digital Human Rights, Bridging Digital Divide, building an inclusive Information Society.***
- ***"Technology has produced the information age. Now it is to all of us to build an information society…"*** **- Kofi Annan (SG/UN)**





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National efforts to bridge “Digital Divide”



Japan : e-Japan (2001)
IT Strategy Headquarters

USA : Falling Through the Net (1998)
Department of Commerce

UK : Closing the Digital Divide (2000)
Department of Trade and Industry & PAT15

Hong Kong : Digital 21 (2001))
Information Technology and Broadcrasting Bureau

Korea : Cyber Korea 21 (1999)
Minister of Information and Communication

*The Digital Divide Act (2001)

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e-Opportunity of e-Taiwan project

Small and Medium Enterprises



Low informatization

Bridging “digital divide” in industries

aged people

aborigine

children



woman

Bridging “digital divide” in country



Least developed countries



Information poor

Bridging global “digital divide”

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Digital Opportunity Centers scattered in many townships of Taiwan

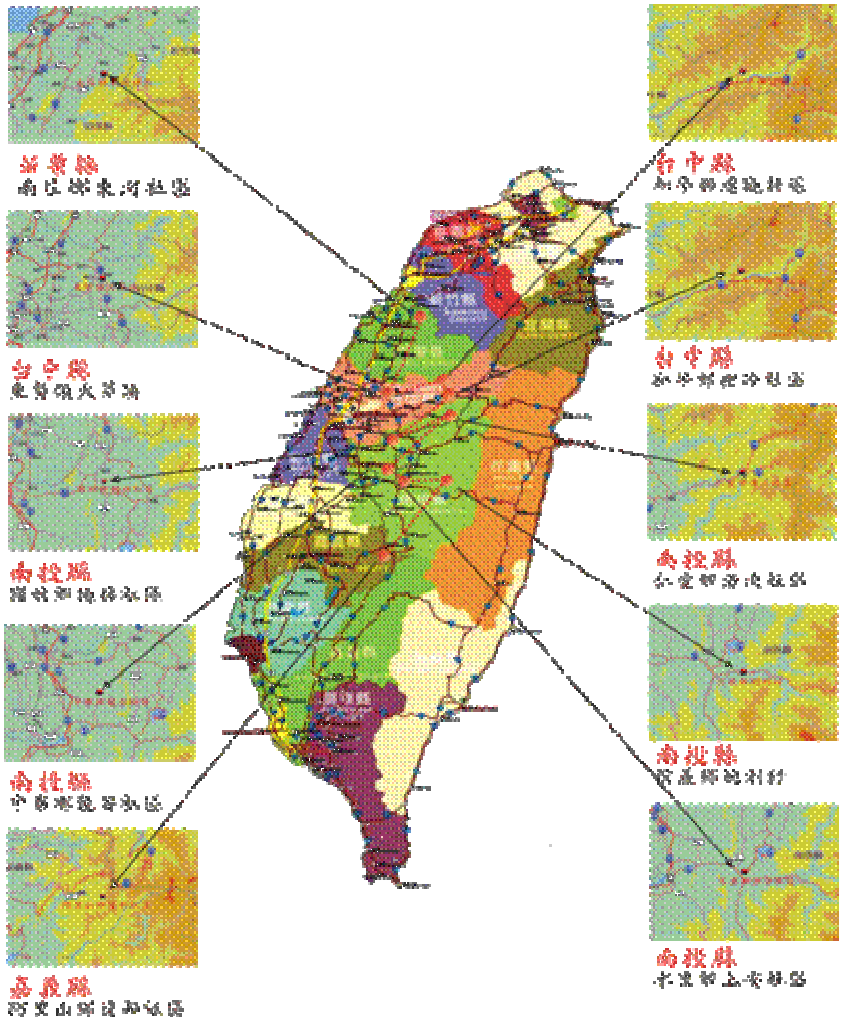


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Digital opportunity centers in the 921 region

城鄉e起來，台灣好將來

九二一重建區數位機會推廣計畫—數位機會中心建置分佈圖



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Opening ceremony of the Chung-liao digital opportunity centre (0921/2004)







Begin from the left：Mr. Supomo Sugirman, Indonesia Economic and Trade Office in Taipei; Dr. Lin, Minister without Portfolio, Executive Yuan; Mr. Centeno, Minister without Portfolio, Guatemala; Dr. Ke, President, III; Dr. Huang, Executive Vice President

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Creating digital opportunities in partner countries

A



B



C



A: 2004.02 Swaziland,
Digital Opportunity delegation

B: 2004.11 Paraguay,
presentation ceremony of the computers to IT school

C: 2004.11 Chile
presentation ceremony of the computers to IT school

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Digital opportunity delegation to Guatemala

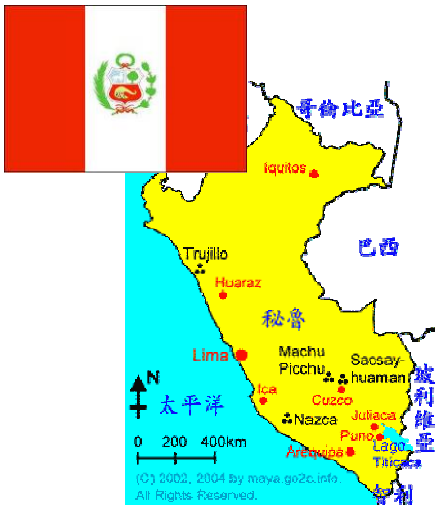






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Opening ceremony of the Peru digital opportunity centre





Aug. 2005, IT Road Show Forum in Peru





Aug. 2005, Opening Ceremony of the Peru ADOC Partner Offices, Digital Opportunity Centre



Aug. 2005, Opening Ceremony of the Peru ADOC Partner Offices, Digital Opportunity Centre

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Information promoting plan in El Salvador





Visit Centro Escolar and investigate the computer classroom set up in future



Visit Ministry of Education, discuss the cooperative model in the future

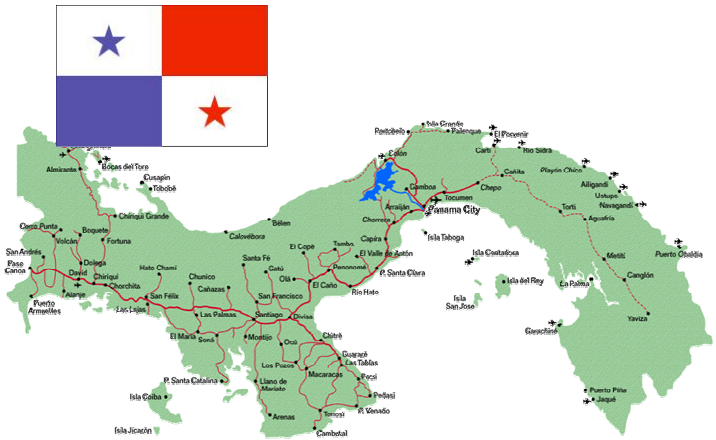
- ***Time: July, 2005~Nov. 2006***
- ***Goal***
 - **Implementation of e-Training Programs & Taiwan IT policy experience Forum**
 - **Establishment of information training centre**
 - **Development & Design of agricultural information system**



Aug. 2005, Meeting with NGO FUNDAEDUCA/CEO and Ministry of Education in Salvador

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Agricultural information promoting plan in Panama





Aug. 2005, Visit presidential palace innovation committee in Panama



Aug. 2005, Visit Ministry of Agriculture in Panama

- ***Time: July, 2005~Nov. 2006***
- ***Goal***
 - **Implementation of e-Training Programs & Taiwan IT policy experience Forum**
 - **Establishment of information training centre**
 - **Development & Design of agricultural information system**



Aug. 2005, With the state-run headmaster of agricultural school of Panama in the information training centre

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Providing Digital Opportunities for All



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III's overseas offices



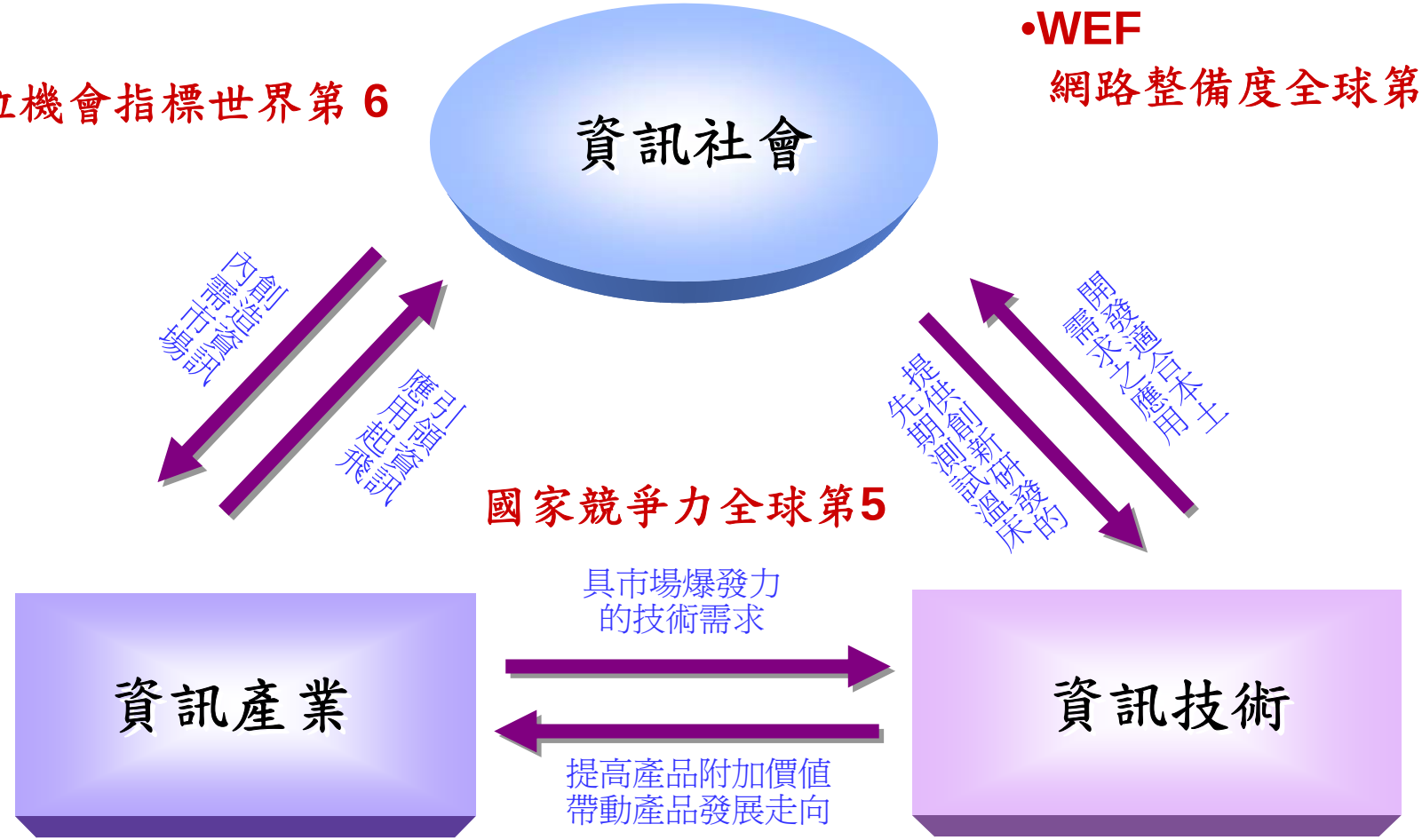
• H.Q. • Overseas offices • (APEC) Digital Opportunity Centers • ODC

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III: vision and mission statement

•ITU
數位機會指標世界第 6

•WEF
網路整備度全球第 7

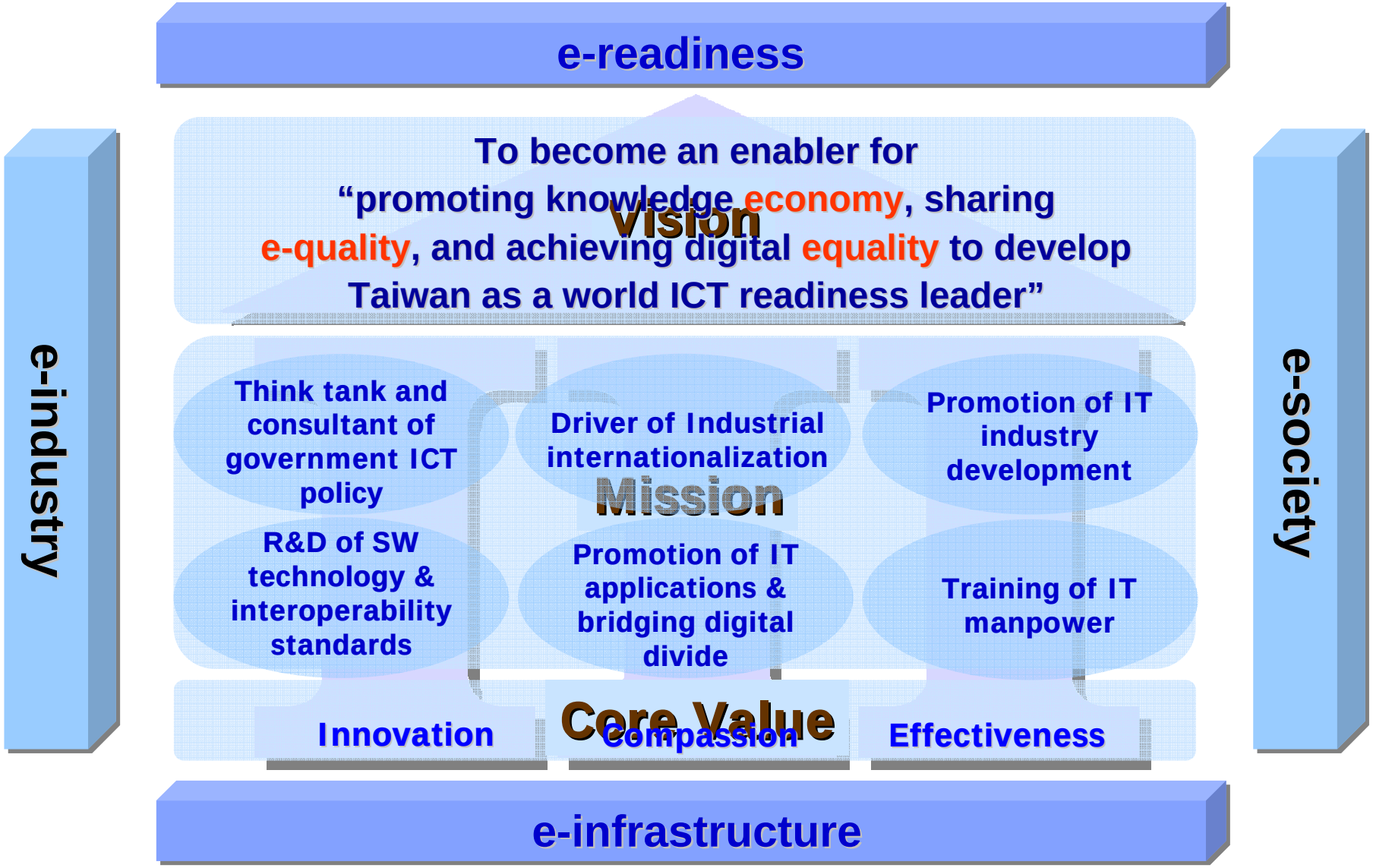


MIT資訊產業全球第4

•WEF
資通訊技術全球第6

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III: vision and mission statement



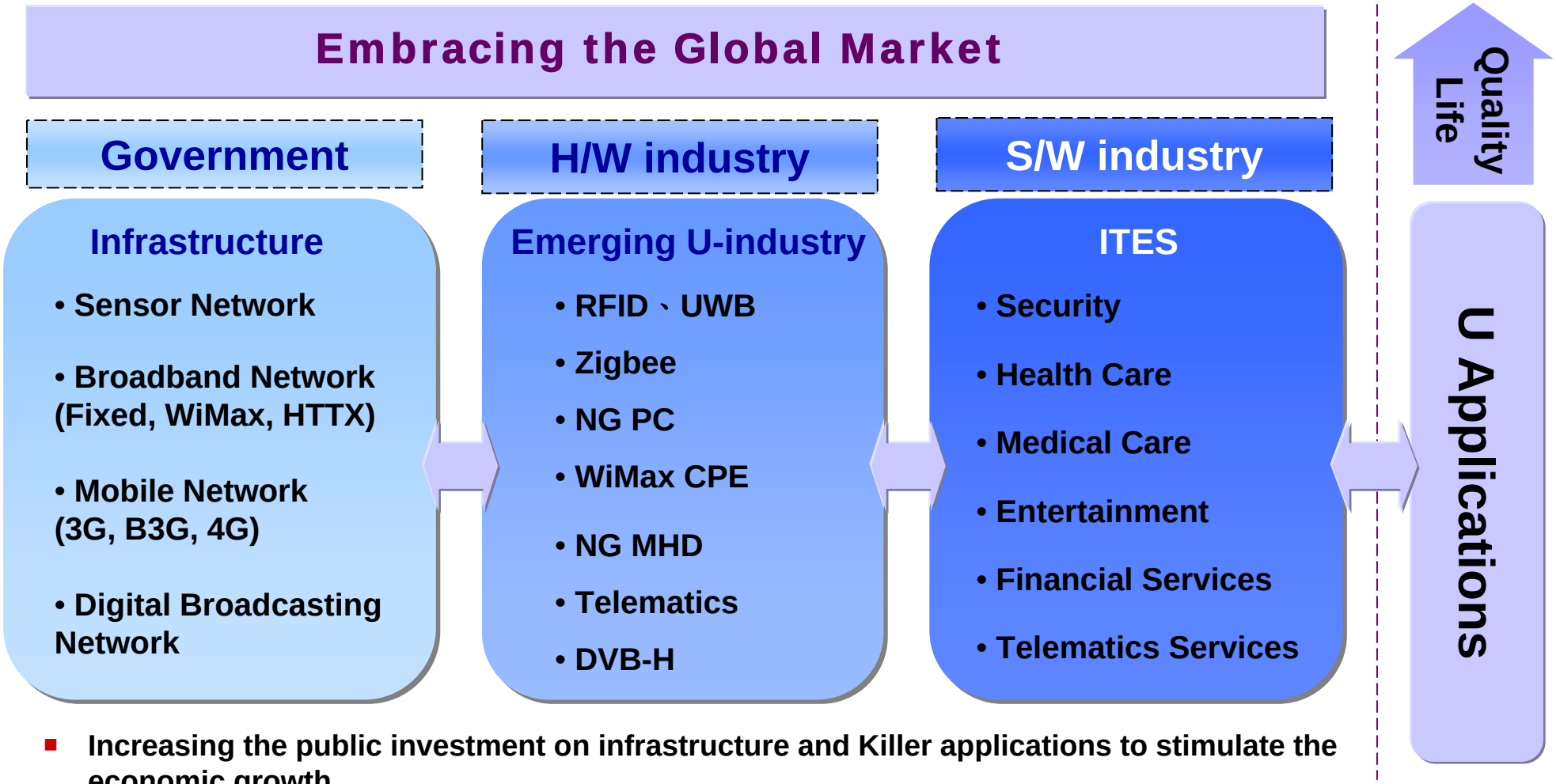
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Outline

- *Introduction*
 - *- the e-world around us*
- *Why Taiwan matters?*
 - *- the e-state we are in*
- *The way forward*
 - *- and the challenges lie ahead*
- *Building the ubiquitous network society*
 - *- with all-embracing e-services*
- ***Closing remarks***
 - ***- a vision and mission statement***

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ITES for the Future



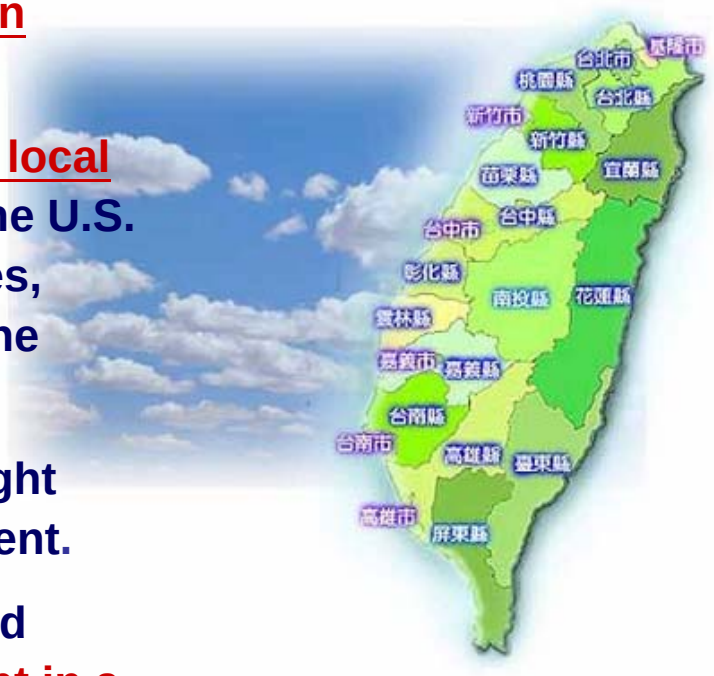
- Increasing the public investment on infrastructure and Killer applications to stimulate the economic growth.
- Promoting IT Service Industry to increase domestic expenditures and the growth of service industry.
- Promoting the emerging Technology industry, such as hand-held device and Telematics.

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ITES for the Future

Information Technology Enabled Service: effectively utilize ICTs in specific domain to create new service model.

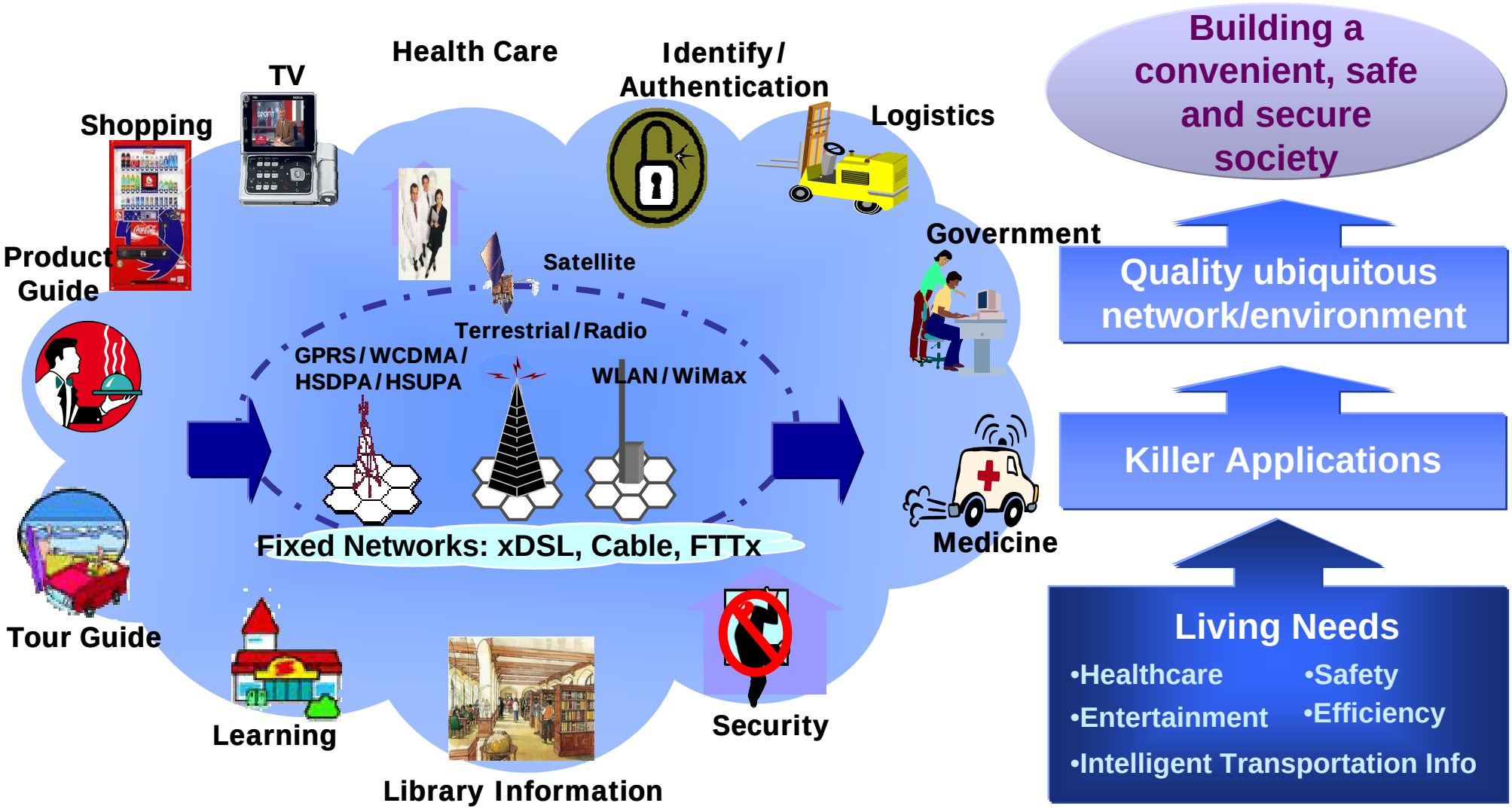
- **The evolving path of TECHNOLOGY: from research, manufacture, system integration to Information Technology Enabled Service (ITES).**
- **ITES provides services that are tailored to the local market. The services/products developed in the U.S. may be leading in their innovative technologies, however, it may not be applicable to all over the world.**
- **The best testbed for ITES is in Taiwan: with right scale and a mature, multi-discipline environment.**
- **In view of resource integration, time frame, and cost/risk management, Taiwan is without doubt in a most favorable position to develop ITES.**



Reference: BusinessWeek, #901 (2005-02-28)
ITES: Future of Industries in Taiwan

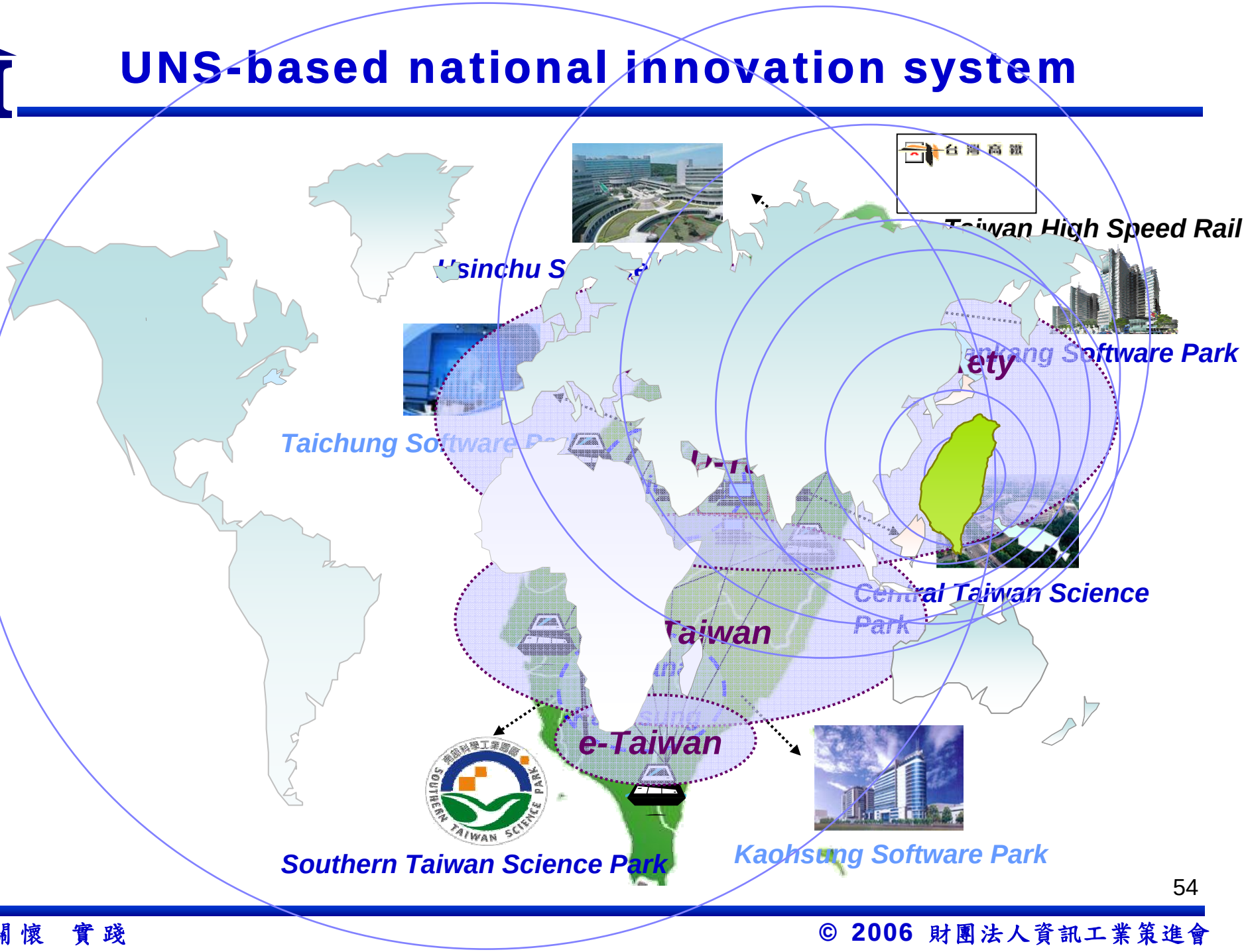
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UNS: a convenient, safe and secure society



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UNS-based national innovation system



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